



RedBeam Check In/Check Out™

User Manual

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Overview

General Info

RedBeam Check In/Check Out™ was designed to make tracking check out items faster and more reliable. Use the software to track file folders, videos, equipment, tools, and other valuable items.

This document is divided into several sections which explain the functions of RedBeam Check In/Check Out™.

The “*Installation*” section explains how to install the RedBeam Check In/Check Out™ software on your PC.

The “*PC Application*” section describes the main system functions: master data, transactions, reporting, sync handheld (*Mobile Edition* only) and admin.

The “*Using the Mobile Computers*” section explains the main functions to be used on the mobile computer: check out, check in, reserve and history. These functions are only available if you are using the *Mobile Edition* of the software.

Before installing the RedBeam Check In/Check Out™ software, please make sure that the following system requirements are met.

PC Prerequisites

In order for the PC software to perform properly, the PC must have the following:

- Windows® XP, 2003, Vista or Windows® 7
- Pentium® IV or Greater Processor
- 512 MB RAM, 1 Gig Free Hard Disk Space
- Microsoft® ActiveSync (for XP) or Windows® Mobile Device Center (for Vista and Windows® 7) if using *Mobile Edition*
- Microsoft® SQL Server 2000, 2005, 2008 or 2008R2 (if more than 10 concurrent users)

Mobile Computer Prerequisites

If you are using the *Mobile Edition* please go to the www.redbeam.com website under Products->Barcode/RFID Readers for a list of compatible devices.

You may also contact RedBeam or your local RedBeam reseller for questions about hardware compatibility.

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Section 1: Installation

The RedBeam Check In/Check Out™ PC software is the main database for all of your item information. The software is found on the CD that came with this system. This software allows you to enter items, check them in and out and run a variety of useful reports.

Installing the PC Software

IMPORTANT: If you have purchased licenses for a multi-user version of the system and want to network all of your PCs together, install the RedBeam Check In/Check Out™ software on the computer or server where you want the database to reside. Once installed there, you can install on your other PCs.

Before installing please note the following recommendations to insure a successful install:

1. You must be logged in as a Local Windows Administrator to install.
2. If you are running a Windows Vista or Windows 7 machine, you must first disable the User Account Control (UAC). UAC settings can be found under Control Panel->User Accounts.
3. Temporarily disable all firewalls and anti-virus applications. (If you click your Start button and type **services.msc** into your run bar (Windows XP) or start search bar (Windows Vista/7), you can see what firewalls and anti-virus applications are running and can stop and disable them.)

To install the PC portion of RedBeam Check In/Check Out™, place the CD in the CD ROM drive. Using Windows Explorer, browse to the CD ROM drive. Open the *Check In Check Out PC Installation* folder and double click the “*setup*” installation icon.



An installation wizard will take you through the installation steps. The installation may take several minutes. You may need to restart your computer once the installation is finished.

Note: If you are using the Mobile Edition of the software, the mobile computer portion of RedBeam Check In/Check Out™ is loaded during the initial sync with the handheld which is described under the Sync Handheld section of this manual.

Limited Access Windows Logins

If users with limited security rights will be using the application, a user with administrative rights must give “full control” access to the HKEY_LOCAL_MACHINE\SOFTWARE\RCO registry node for the “users” group just after installation occurs on the workstation.

To make this change:

- Click **Start**, and then click **Run**.
- In the **Open** box, type **regedit** and then click **OK**.

In **regedit**,

- Find the appropriate node and right click

- Select “Permissions”
- Select the “Users” group
- Check the “Allow” box for “Full Control”
- Click “Ok”

The admin should log in once to the client and enter the database user ID and password to create the initial connection to the server. Windows Vista users will need to run the application the first time in administrative mode. To do this, right click the icon for the application and select Run as Administrator.

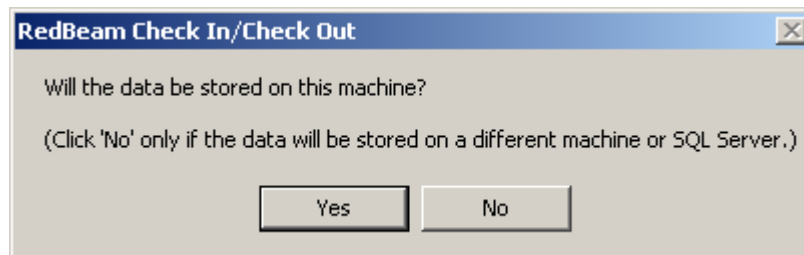
Section 2: PC Application

Accessing the Application

To access the program on the computer, double click the icon on the desktop labeled *RedBeam Check In Check Out* or go to *Start->Programs->RedBeam->Check In Check Out->RedBeam Check In Check Out*.

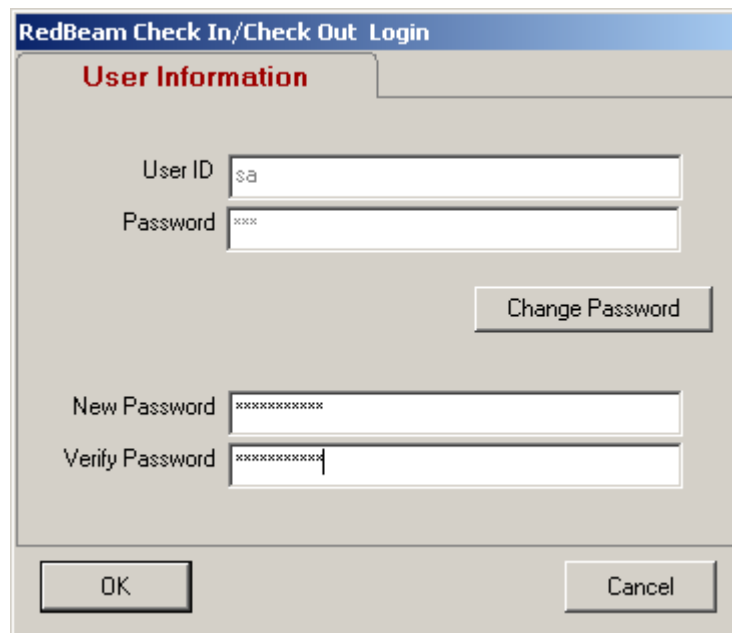
Opening the Application for the First Time

When the application is launched for the first time you will be asked, “**Will the data be stored on this machine?**”



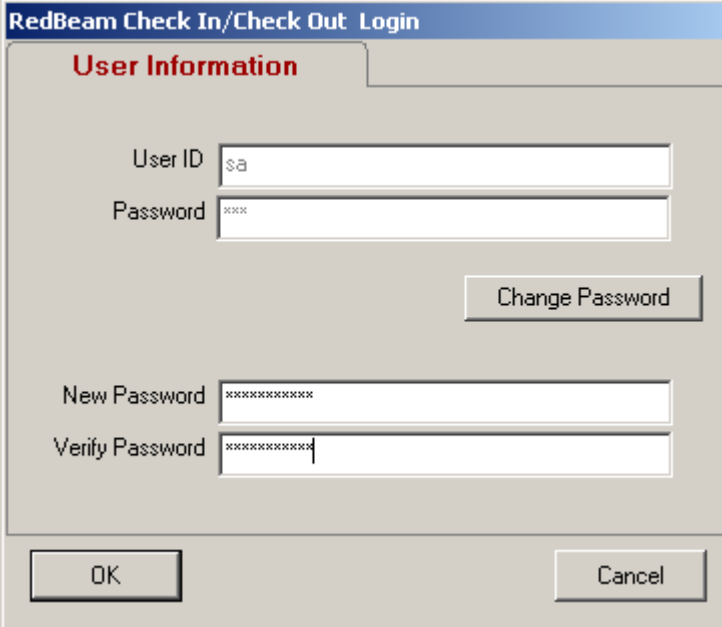
Single User Licenses

If you have a single user license, click “Yes”. You will be given a default user ID and password. Please enter a new password. Enter it a second time for verification. **IMPORTANT: Please write down or remember both your default user ID and your new password and keep them in a safe place. You may need them again later.**



Multi-user Licenses

If you have a multi-user license that you would like to have networked, you will first need to install the software on the computer or server (referred to as “server” for the rest of this section) where you want the database to reside. Open the application on the server. You then will be asked, “Will the data be stored on this machine?” Click “Yes”. This will create an instance of the Express version of Microsoft’s SQL database that comes with and is used by this software. You do not need a full version of Microsoft ® SQL to use this software.

The image shows a Windows-style dialog box titled "RedBeam Check In/Check Out Login". It has a tabbed interface with the "User Information" tab selected. The dialog contains several text input fields: "User ID" with the text "sa" entered, "Password" with "xxxx" entered, "New Password" with "xxxxxxxxxx" entered, and "Verify Password" with "xxxxxxxxxx" entered. There is a "Change Password" button to the right of the Password field. At the bottom of the dialog are "OK" and "Cancel" buttons. The dialog has a blue title bar and a light gray background.

You will be given a default user ID and password. Please enter a new password. Enter it a second time for verification. **IMPORTANT: Please write down or remember both your default user ID and your new password and keep them in a safe place. You will need this information to network your other PCs to this database.**

Once this is done, go back to the first PC that you would like to network to this “server”. **When you open the application you will be asked, “Will the data be stored on this machine?” Click “No”.** You will be asked to enter the user ID and password for the server. This is the user ID and password you wrote down or remembered from the server installation. Enter the information in the *User Information* tab.

The dialog box is titled "RedBeam Check In/Check Out Login". It has two tabs: "User Information" (selected) and "Server". Under "User Information", there are two text boxes: "User ID" containing "sa" and "Password" containing "xxxxxxxxxx". To the right of the password box is a "Change Password" button. At the bottom are "OK" and "Cancel" buttons.

Next click the *Server* tab.

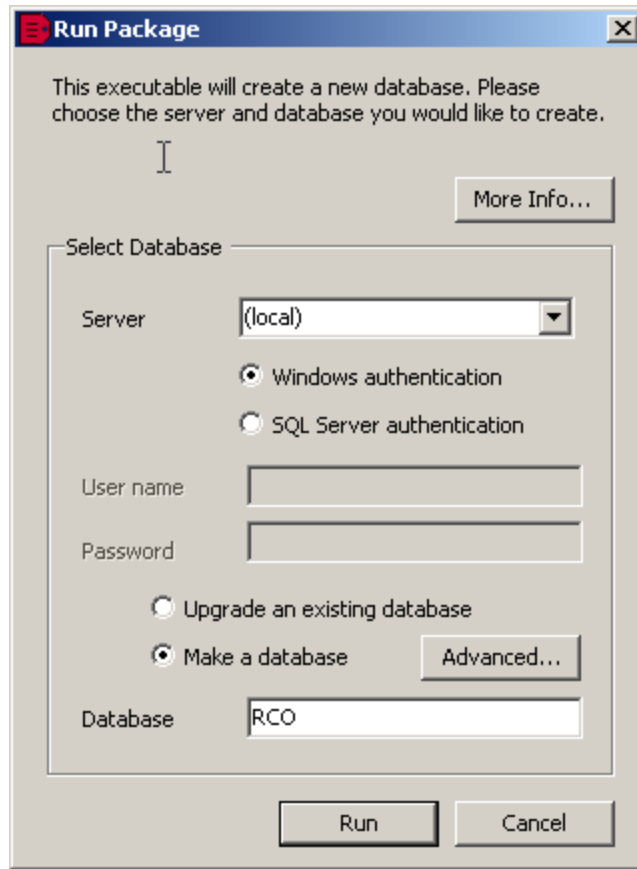
The dialog box is titled "RedBeam Check In/Check Out Login". It has two tabs: "User Information" and "Server" (selected). Under "Server", there is a text box labeled "Enter a Server name or IP address" containing "127.0.0.1". Below this is a button labeled "Search for Available Servers" followed by the text "and select one from the list". Below that is a large empty rectangular box. At the bottom left is a checkbox labeled "Use a SQL Server not installed by this application". At the bottom right is a blue hyperlink labeled "Where is my server?". At the very bottom are "OK" and "Cancel" buttons.

Enter the server where your data is stored. Do this by clicking the *Search for Available Servers* button. When clicked, the system will look for other *RedBeam Check In/Check Out™* databases on your network. The server you just installed on should display in the box. Click to select it. (If the server does not display, you may enter the server name or IP address if known.)

When done, click *OK*. The application will launch and you will be connected to your main server database.

Advanced

If you are using your own full version of Microsoft® SQL Server 2000, 2005 or 2008, you will need to install the database to the SQL Server you would like to host the database. The database installation file may be found on the installation CD in the directory *\Utilities\Seed.exe*. Copy the file to a directory of your choice on the machine hosting SQL Server. Once in the directory, double click to execute the file and you will be presented with the following screen:

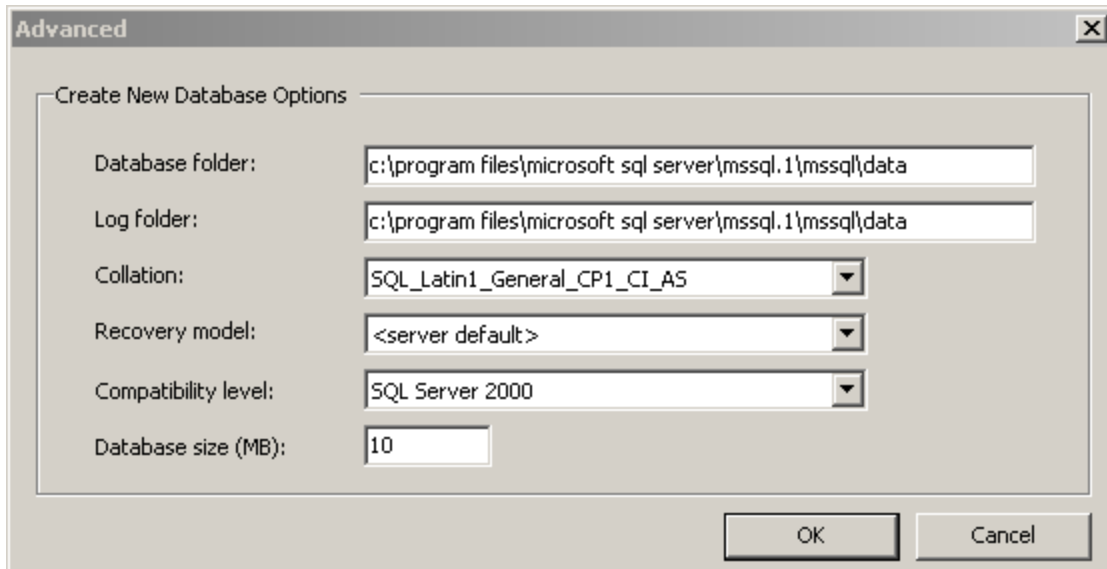


If you aren't using the "(local)" default instance, you may type the name or IP address of the SQL Server in the "Server" drop down box or you may click the down arrow to allow the application to search for eligible servers. If you are using a non-default instance of SQL Server be sure to include the instance name in your selection (i.e. *MachineName\InstanceName*).

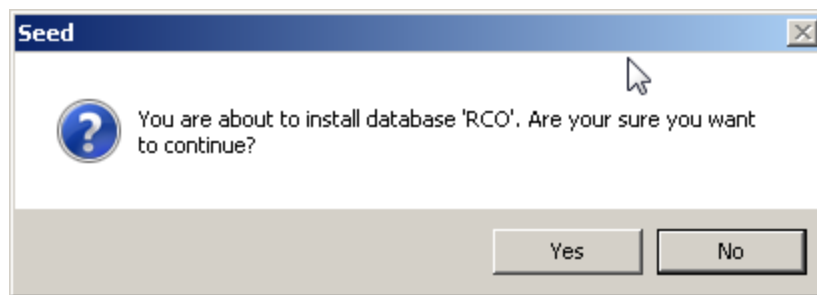
Leave the "Make a database" option selected and leave the database name as "RCO".

If you wish, you may specify an SQL Server security user name and password (with authority to create new databases) instead of the default windows authentication. If you do not have admin access to the SQL Server machine, this may be easiest.

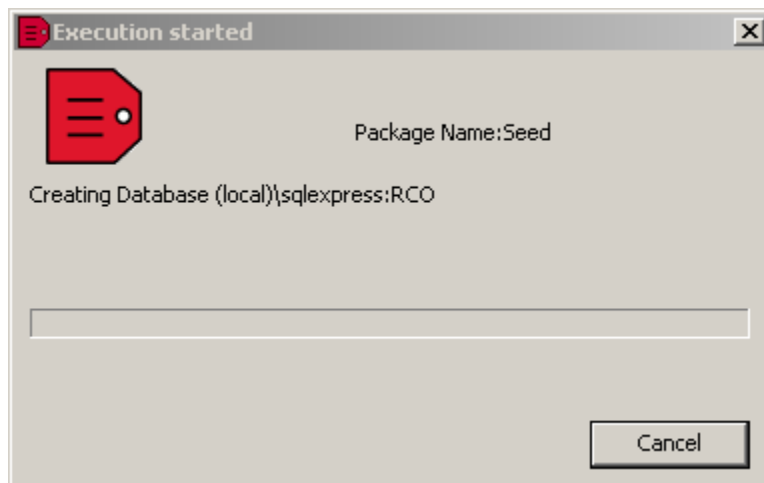
If you would like to store the database files in directory locations other than the defaults, you can change the file locations in the "Advanced" tab. **Do not** change the Collation on this screen.



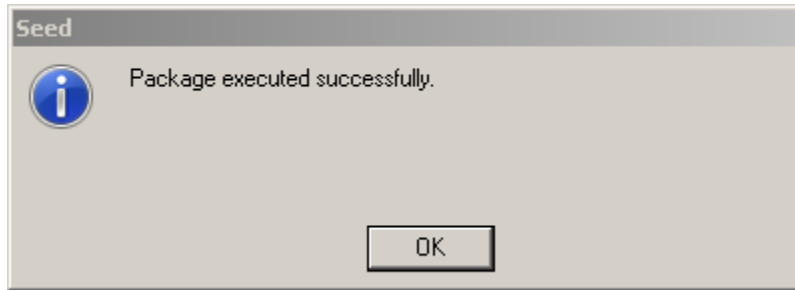
Click “Run.”



Click “Yes.”



After the database had been created you will see the following:



Click "Ok".

For each client machine, open the application. When you open the application you will be asked, **"Will the data be stored on this machine?"** Click **"No"**. You will be asked to enter the user ID and password for the server. This will be an SQL Server authentication user and password. The login for this user must be in the SQL Server "securityadmin" and "dbcreator" roles to administer security and backups inside the application. Granting "db_owner" access for the database itself is sufficient to use the other features of the application. RedBeam highly recommends the initial login be performed with a User ID having "securityadmin" and "dbcreator" roles. Other users with fewer rights may be created using the administrative features of the application.

Enter the login information in the *User Information* tab.

A dialog box titled "RedBeam Check In/Check Out Login" with a blue header bar. It has two tabs: "User Information" (selected, in red text) and "Server". Under the "User Information" tab, there are two text input fields. The first is labeled "User ID" and contains the text "sa". The second is labeled "Password" and contains a series of asterisks "xxxxxxxxxx". To the right of these fields is a button labeled "Change Password". At the bottom of the dialog are two buttons: "OK" on the left and "Cancel" on the right.

Next click the *Server* tab.

Login

User Information **Server**

Enter a Server name or IP address SQL Server Instance

Or Search for Available Servers and select one from the list

☒ Use an SQL Server not installed by this application

OK Cancel

Click the “Use an SQL Server not installed by this application” checkbox. If you have not already done so, click *Search for Available Servers*. Choose the server from the list box or type the server name or IP address into the *New Server* field.

When done, click *OK*. The application will launch and you will be connected to your main server database.

Opening the Application with User Security Activated

If this is not the first time you have launched the application and you have activated user security (under *Admin->Security*), when you open the application you will be asked to enter one of the user ID’s and passwords you have set up. To change your password, click *Change Password*.

Login

User Information

User ID sa

Password xxxxxxxxxx

Change Password

OK Cancel

Opening the Application without User Security Activated


If this is not the first time you have launched the application and you do not have user security activated, you will be taken directly into the application.

Registration

When the application is launched for the first time you will be asked to register the software. You may register electronically over the internet, or you can contact RedBeam, Inc. at 877-373-0390. If you choose not to register, the application will run in demo mode.

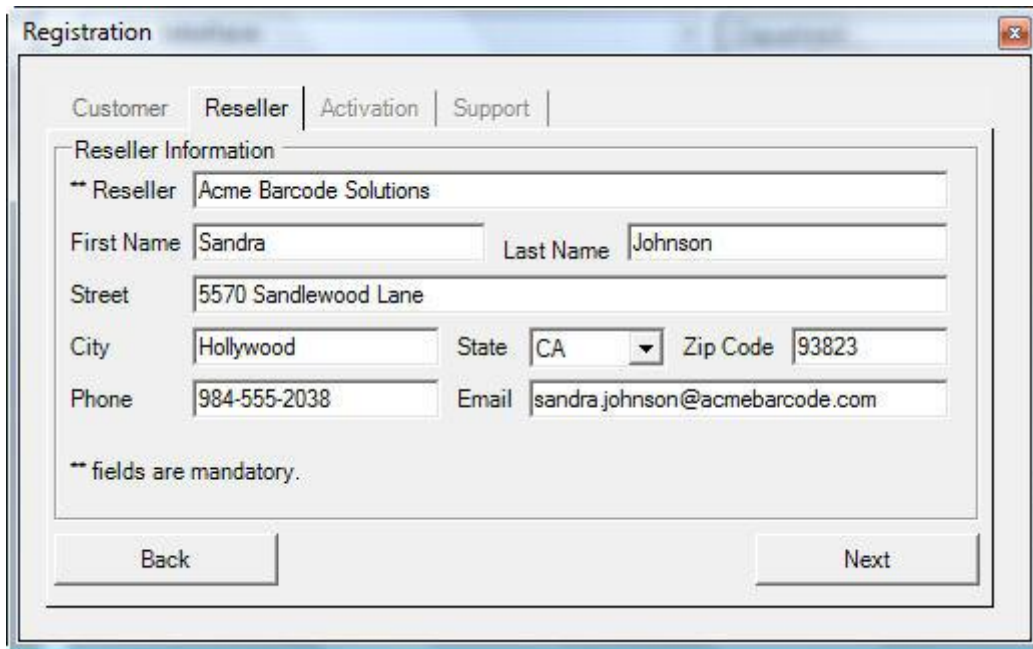
The *Registration* screens include four tabs including *Customer*, *Reseller*, *Activation* and *Support*.

Under the *Customer* tab, enter information about your company including company name, your name, address, phone and email.



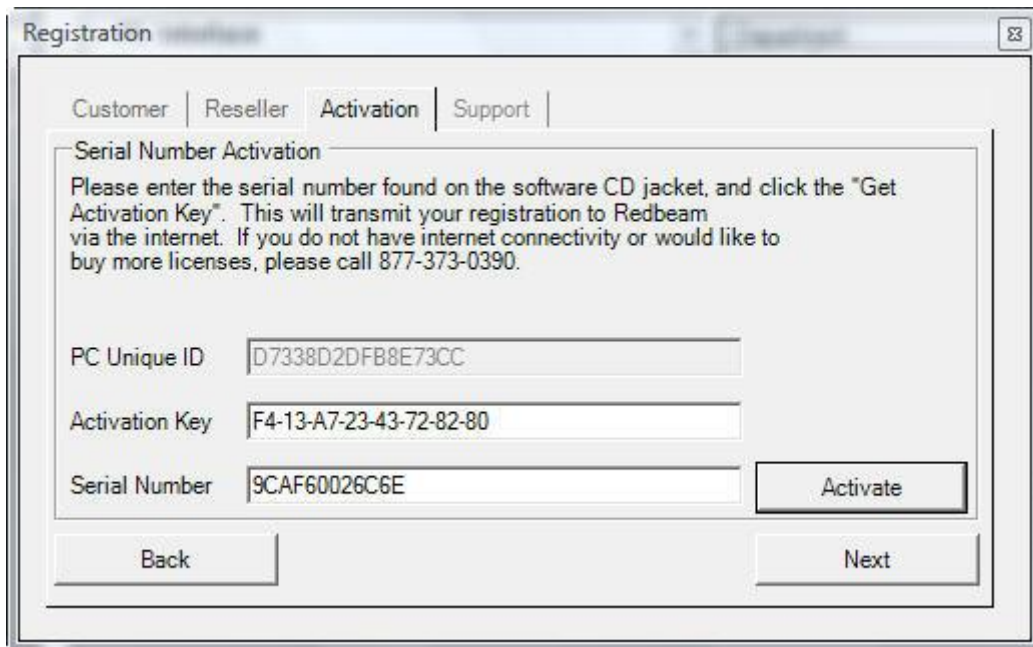
The screenshot shows a Windows-style dialog box titled "Registration". It has four tabs: "Customer", "Reseller", "Activation", and "Support". The "Customer" tab is selected. Below the tabs is a section titled "Company Information" with the instruction "All fields are mandatory." The form contains the following fields: "Company" (text box with "RedBeam, Inc."), "First Name" (text box with "John"), "Last Name" (text box with "Smith"), "Street" (text box with "3820 Mansell Road, Suite 280B"), "City" (text box with "Alpharetta"), "State" (dropdown menu with "GA" selected), "Zip Code" (text box with "30022"), "Phone" (text box with "877-373-0930"), and "Email" (empty text box). Below these fields is a checkbox labeled "Please send me update and renewal notices via email." which is checked. At the bottom are "Cancel" and "Next" buttons.

Under the *Reseller* tab, enter information about the company you purchased the RedBeam system from including company name, your contact's name, address, phone and email. This information can be accessed later if you need to order additional licenses, upgrades, support or supplies.



Registration window with tabs: Customer, Reseller, Activation, Support. The Reseller tab is active, showing the 'Reseller Information' section. Fields include: Reseller (Acme Barcode Solutions), First Name (Sandra), Last Name (Johnson), Street (5570 Sandlewood Lane), City (Hollywood), State (CA), Zip Code (93823), Phone (984-555-2038), and Email (sandra.johnson@acmebarcode.com). A note states '** fields are mandatory.' Navigation buttons 'Back' and 'Next' are at the bottom.

Under the *Activation* tab, enter your product serial number and click *Activate*. If you have internet connectivity, the *Activation Key* will automatically be populated by the system. If you do not have internet connectivity, please call 877-373-0390 and provide one of our support specialists the *PC Unique ID* displayed on the screen and your product serial number. They will then verbally provide the activation key for your machine.



Registration window with tabs: Customer, Reseller, Activation, Support. The Activation tab is active, showing the 'Serial Number Activation' section. Instructions: 'Please enter the serial number found on the software CD jacket, and click the "Get Activation Key". This will transmit your registration to Redbeam via the internet. If you do not have internet connectivity or would like to buy more licenses, please call 877-373-0390.' Fields include: PC Unique ID (D7338D2DFB8E73CC), Activation Key (F4-13-A7-23-43-72-82-80), and Serial Number (9CAF60026C6E). An 'Activate' button is next to the Serial Number field. Navigation buttons 'Back' and 'Next' are at the bottom.

Under the *Support* tab, enter your support contract serial number and click *Activate*. If you have internet connectivity, the *Activation Key* will automatically be populated by the system. If you do not have internet connectivity, please call 877-373-0390 and provide one of our support specialists the *PC Unique ID* displayed on the screen and your support contract serial number.

They will then verbally provide the activation key for your machine. You may enter multiple support contracts to extend support for multiple years.

The image shows a 'Registration' window with a 'Support' tab selected. Inside the 'Support Activation' section, there is a message: 'To purchase support please contact your reseller (.) or call 984-555-2038'. Below this is a table with two columns: 'SupportNumber' and 'SupportEndDate'. The table contains two rows: one with '72F47B' and '3/4/2009', and another with '885436' and '3/4/2010'. Below the table, there are two input fields: 'Activation Key' with the value '176EDCAA530E26CE4' and 'Support Number' with the value '72F47B'. To the right of the 'Support Number' field is an 'Activate' button. At the bottom of the window are 'Back' and 'Finish' buttons.

SupportNumber	SupportEndDate
72F47B	3/4/2009
885436	3/4/2010

Activation Key: 176EDCAA530E26CE4

Support Number: 72F47B

Buttons: Back, Activate, Finish

Menu Overview

When the application is launched, there will be several tabs along the top of the screen that indicate the main system functions. These include:

Master Data – enter basic data used by the rest of the system including items and locations

Transactions – check items in and out

Reporting – generate item, overdue, checked out, usage and transaction reports and print barcodes

Sync Handheld – sync the mobile computer with PC database (*Mobile Edition* only)

Admin – network, back up data, import data, purge, over-ride captions and implement user security

Each time the application is opened, it will default to the *Transactions* tab and the *Check Out* screen depicted below. You can move between each of the main system functions by clicking on the desired tab. Under each of the main function tabs, you will notice sub-functions buttons along the left hand menu. To access the sub-function, click on the button that describes it.

RedBeam Check In/Check Out

Exit View Help

Master Data **Transactions** Reporting Sync Handheld Admin

Check Out
 Check In
 Fee Pay
 Reserve
 Reservations

Update Time 9/10/2007 12:17 PM **Reference No**

Room **Employee**

Barcode Loc1 ID e1

Description Location 1 Name Vandelay, Art

Select a Room:

- My Company
 - Legal Building
 - Location 1
 - Location 2
 - Location 3
 - Physical Plant Facility
 - Location 4
 - Location 5
 - Location 6

Item

Barcode T11 Description Big Heavy Drill Status Good

Note

Includes spare battery.

Project ID Project A Remove Item Add Item

Due	Item Barcode	Item Description

Print a Receipt ☒ Clear Update

Function Bar

On most system screens, you will find a function bar that looks like this:



The buttons perform the following functions:



Find – Search for a specific record.



First – Scroll to the first record.



Prev. – Scroll to the previous record.



New – Create a new record.



Edit – Edit an existing record.



Copy – Create a new record by copying existing record.



Del. – Delete a record.



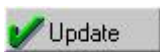
Undo – Undo the changes made to a record.



Next – Scroll to the next record.



Last – Scroll to the last record.



Update – Commit record entries to the database.



Barcode – Print a barcode label.

Master Data

The *Master Data* tab is where data used by the rest of the system is entered. If setting up the system for the first time, the information under this function should be entered prior to working with the item data section. As indicated by the buttons listed along the left hand side of the screen, the following data is entered under master data:

Location – where the company structure including buildings and rooms are entered

Item – where items to be checked in and out are entered

Employees – where employee information is entered

Item Type – where item categories are created

Department – where departments are created

Purchasing – where purchasing lists are created for units of measure, vendors, manufacturers and model numbers

Status – where items statuses are created

Project – where projects are created

RedBeam Check In/Check Out

Exit View Help

Master Data Transactions Reporting Sync Handheld Admin

Location ID: T11 Description: Big Heavy Drill

Item Main Item Information Check Out Information

Item Type: Tools
Unit of Measure: Each
Manufacturer: Big Heavy Tools
Model: DWET544G8
Note:
☐ Inactive

Image User Fields

☐ Stretch

Find New Edit Copy Del. Undo Update

Item Barcode ID	Item Description	Item Type	Unit of Measure	Manufacturer	Model
T11	Big Heavy Drill	Tools	Each	Big Heavy Tools	DWET544G8
T12	Stapler	Office Products	Box		
T13	Moots Case	Legal Files			

Location

The three organizational levels in the system are set up under the location function. The highest level of the organization is the company. Once the company is set up, buildings can be added. Once a building is set up, all of the rooms in the building can be added.

Company

To set up your company information, click on the *Location* button and select the *Company* tab. The company is the highest organizational level in the system. Only one company can be entered.

To create a *Company*, click on the *New* button and enter the information. When finished, click the *Add* button.

To edit your company information, click the *Edit* button. When finished, click the *Update* button.

The side panel is a tree structure that allows you to view the buildings and rooms in the company. You can expand or close the tree by clicking on the plus and minus icons next to the information you want to view. Clicking on the building or room description displays more detailed information.

The screenshot displays the RedBeam Check In/Check Out application window. The title bar reads "RedBeam Check In/Check Out". The menu bar includes "Exit", "View", and "Help". The main interface has a "Master Data" tab selected, with sub-tabs for "Location", "Transactions", "Reporting", "Sync Handheld", and "Admin". Under the "Master Data" tab, there is a vertical list of categories: "Location", "Item", "Employee", "Item Type", "Department", "Purchasing", "Status", and "Project". The "Location" category is selected, and a tree structure is shown with "My Company" expanded, revealing "Legal Building" and "Physical Plant Facility". "Legal Building" contains "Location 1", "Location 2", and "Location 3". "Physical Plant Facility" contains "Location 4", "Location 5", and "Location 6". The "Company" tab is selected, showing a form for "My Company". The form fields are: "Description" (My Company), "Street" (123 Company Blvd.), "City" (My City), "State" (FL), "Zip Code" (12345-1234), and "Phone" (123-123-1234). At the bottom, there is a toolbar with icons for "Find", "Edit", "Del.", "Undo", and "Update".

Building

To set up your buildings, click on the *Buildings* tab. A company can have any number of buildings.

To create a new building, click on the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing building, select the building you want to edit from the tree structure, click on the *Edit* button and update the information. When finished, click the *Update* button.

To delete a building, first be sure to move or delete all rooms and items assigned to the building. Select the building you want to delete from the tree structure. Then click on the *Delete* button and confirm the deletion when prompted.

To make a building inactive, click the *Inactive* check box. This will remove the building from drop-down lists in system, but will keep the entry in building master data and reporting.

The screenshot shows the RedBeam Check In/Check Out software interface. The window title is "RedBeam Check In/Check Out". The menu bar includes "Exit", "View", and "Help". The main menu has tabs for "Master Data", "Transactions", "Reporting", "Sync Handheld", and "Admin". The "Master Data" tab is active, and within it, the "Building" sub-tab is selected. On the left, a tree structure shows "My Company" expanded, with "Legal Building" and "Physical Plant Facility" listed. "Physical Plant Facility" is selected, showing its sub-locations: "Location 1", "Location 2", "Location 3", "Location 4", "Location 5", and "Location 6". The right pane displays the "Building" form. The "Description" field contains "Physical Plant Facility". The "Street" field contains "1234 Building 2 Street". The "City" field contains "My City". The "State" field is set to "FL" and the "Zip Code" field contains "12345-1234". The "Phone" field contains "123-123-1234". At the bottom right of the form, there is an "Inactive" checkbox which is currently unchecked. Below the form is a toolbar with icons for "Find", "New", "Edit", "Copy", "Del.", "Undo", and "Upc".

Room

To set up rooms for a building, click on the *Rooms* tab. The room is the lowest organizational level in the system. A building can have any number of rooms.

To create a new room, click on the *New* button and enter the information. If you are labeling each room with a barcode, enter the barcode ID. You can print this barcode by clicking on the *Barcode* icon in the tool bar. Be sure to enter the building in which the room is located. This is mandatory. When finished, click the *Add* button.

To edit an existing room, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a room, first check in any items that are checked out and assigned to the room. Then move or delete all items assigned to the room. Finally, click on the *Delete* button and confirm the deletion when prompted.

To make a room inactive, click the *Inactive* check box. This will remove the room from drop-down lists in the system, but will keep the entry in room master data and reporting.

The screenshot displays the RedBeam Check In/Check Out software interface. The main window has a menu bar with 'Exit', 'View', and 'Help'. Below the menu bar are tabs for 'Master Data', 'Transactions', 'Reporting', 'Sync Handheld', and 'Admin'. The 'Master Data' tab is active, and within it, the 'Room' sub-tab is selected. On the left side, there is a tree view under 'Select a Location to View or Edit:' showing a hierarchy: 'My Company' -> 'Legal Building' (with sub-items 'Location 1', 'Location 2', 'Location 3') and 'Physical Plant Facility' (with sub-items 'Location 4', 'Location 5', 'Location 6'). The 'Location 4' item is selected. To the right of the tree view, there are input fields for 'Description' (containing 'Location 4'), 'Barcode ID' (containing 'Loc4'), and 'Assigned to' (a dropdown menu showing 'Physical Plant Facility'). At the bottom right, there is an 'Inactive' checkbox which is currently unchecked. Below these fields is a toolbar with icons for 'Find', 'New', 'Edit', 'Copy', 'Del.', 'Undo', and an 'Upc' button with a checkmark icon.

Item

The *Item* tab is where all information is entered for the items you will be checking out.

There are two tabs at the top of the *Item* screen including:

Main Item Information – general information about an item

Check Out Information – settings that determine what happens when an item is checked out

When setting up items, you will first enter your *Main Item Information* and then *Check Out Information* for use during check out and check in.

Item Barcode ID	Item Description	Item Type	Unit of Measure	Manufacturer	Model
T11	Big Heavy Drill	Tools	Each	Big Heavy Tools	DWET5
T12	Stapler	Office Products	Box	Big Heavy Tools	DWET5
T13	Moots Case	Legal Files	Box	Big Heavy Tools	DWET5

Main Item Information

To create a new item, click on the *New* button and enter the information on the Main Item Information tab. Enter the item *ID* (this must be the same as the item barcode), a description, the item type, unit of measure, manufacturer, model number and notes if applicable.

Print a barcode label for this barcode ID by clicking on the *Barcode* button. Printer settings will be the ones last selected in the *Reporting -> Label Printing* function.

Enter an image of the item by cutting and pasting it into the image field or by clicking the “*Open*” folder icon and choosing an image file from a directory.

Enter up to five user fields by clicking on the *User Fields* tab. You can rename the user fields by double clicking on the description of the user field you want to change. Descriptions for the user fields are universal for all items in the system.

To edit an existing item, select the item you want to edit from the grid at the bottom of the screen, click on the *Edit* button and update the information. When finished, click the *Update* button.

To delete an item, first be sure the item is checked in. Then click on the *Delete* button and confirm the deletion when prompted.

To make an item inactive, click the *Inactive* check box. This will remove the item from drop-down lists in the system, but will keep the entry in item master data and reporting.

Check Out Information

On the *Check Out Information* screen you can add the serial number, the location the item will be checked into and out of and the status of the item. If the item is checked out, the employee the item is checked out to will display in the *Checked To* field.

In the *Transaction Info* sub-tab, enter information that will determine what happens when an item is checked out including:

Transaction Fee – the fee to check out the item (if any)

Check Out Period – the unit of time with which the check out is measured

Period Quantity – the duration that the item is checked out for (for example, if check out period is daily and the period quantity is 2, the item can be checked out for 2 days)

Overdue Period – the unit of time with which overdue time is measured (for example, day or week)

Overdue Fee – the overdue fee charged per overdue period

Include Weekends – includes weekends in check out and overdue calculations

Allow Changes at Checkout – allows changes to be made to the item defaults during check out

In the *Purchasing Info* sub-tab, enter a vendor, P.O. #, acquisition date and cost.

When finished, click the *Update* button.

RedBeam Check In/Check Out

Exit View Help

Master Data Transactions Reporting Sync Handheld Admin

Location **ID** T11 **Description** Big Heavy Drill

Item Main Item Information **Check Out Information**

Employee Serial No 4486228893 Checked To

Item Type Status Good Transaction Info **Purchasing Info**

Department Room Location 4 Vendor Light Arm Industries

Purchasing Select a Check Out Room: P.O. # 789-4562

Status My Company Acquisition Date 10/05/2005

Project Legal Building Cost \$100.00

Physical Plant Facility

Location 4

Location 5

Location 6

Find New Edit Copy Del. Undo Barcode

Item Barcode ID	Item Description	Item Type	Unit of Measure	Manufacturer	Model
T11	Big Heavy Drill	Tools	Each	Big Heavy Tools	DwET5
T12	Stapler	Office Products	Box		
T13	Moots Case	Legal Files			

Employee

To set up your employees, click on the *Employees* button. An employee is the person responsible for a checked out item. This could be a student, customer, or member of any group to which items are checked out. If you would like to change the word “employee” to something more descriptive for your organization, use the *Admin->Caption Override* function in the system.

To create a new employee, click the *New* button and enter the information. When finished, click the *Add* button. If you are providing each employee with an *Employee ID* barcode to be used at check out, you can print the *Employee ID* by clicking on the *Barcode* icon in the tool bar.

To edit an existing employee, click the *Edit* button and update the information. When finished, click the *Update* button. *Note:* Altering the department an employee is assigned to will alter all current and historical transactions records for that employee.

To delete an employee, check in any outstanding items and pay any outstanding fees before deleting. Click on the *Delete* button and confirm the deletion when prompted. Historical data including transactions made by the deleted employee will remain in the database for reporting purposes.

To make an employee inactive, click the *Inactive* check box. This will remove the employee from drop-down lists, but will keep the entry in employee master data and reporting.

You can view all of the employees by scrolling through the list on the bottom panel.

Employee ID	Last Name	First Name	Title	Department	Phone	Alt P
e1	Vandelay	Art	Director Of Art	Accounting	213-123-4567	567
e2	Eliot	T.S.	Editor In Chief	Public Relations		
e3	Herbert	Frank		Technology		

Item Type

To set up your item types, click on the *Item Type* button. An item type is a category to which the item belongs. Examples include files, videos, equipment, or tools.

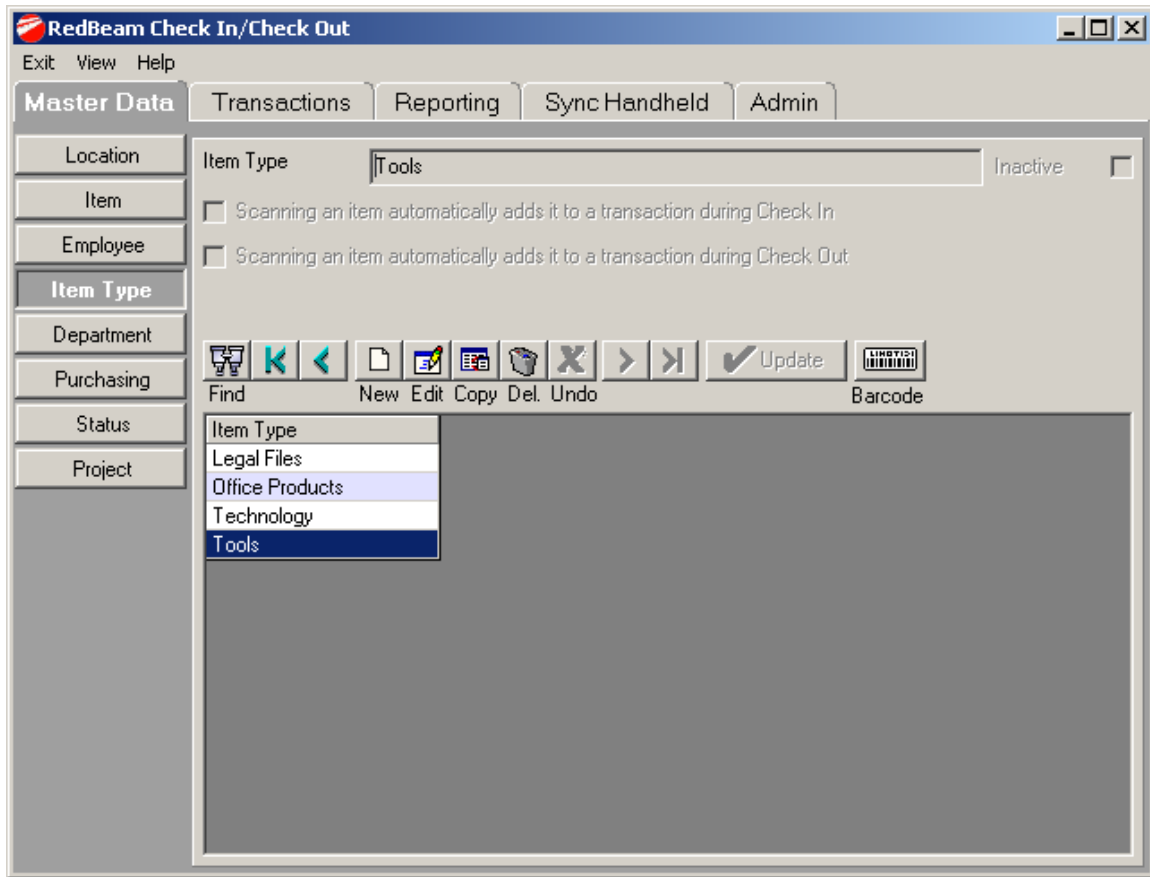
To create a new item type, click the *New* button and enter the information. When using the system to check out or check in your items with a barcode scanner, you have the ability to enter additional information and notes about an item before adding it to the list to be processed. If you do not need to enter any additional information during transactions and would like to streamline the scanning process, put a check in the appropriate *Scanning an item automatically adds it to a transaction during Check Out* or *Check In* check box. When finished, click the *Add* button.

To edit an existing item type, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete an item type, first disassociate the item type from any items on the item master data screen. Then click on the *Delete* button and confirm the deletion when prompted.

To make an item type inactive, click the *Inactive* check box. This will remove the item type from drop-down lists in the system, but will keep the entry in item type master data and reporting.

You can view all of the item types by scrolling through the list on the bottom panel.



Department

To set up your departments, click on the *Departments* button. A department is not a physical location like a building or a room. It is an area of responsibility like the accounting or the human resources department. Employees are assigned to departments. When an employee checks out items, the department they are assigned to also gets updated for reporting purposes.

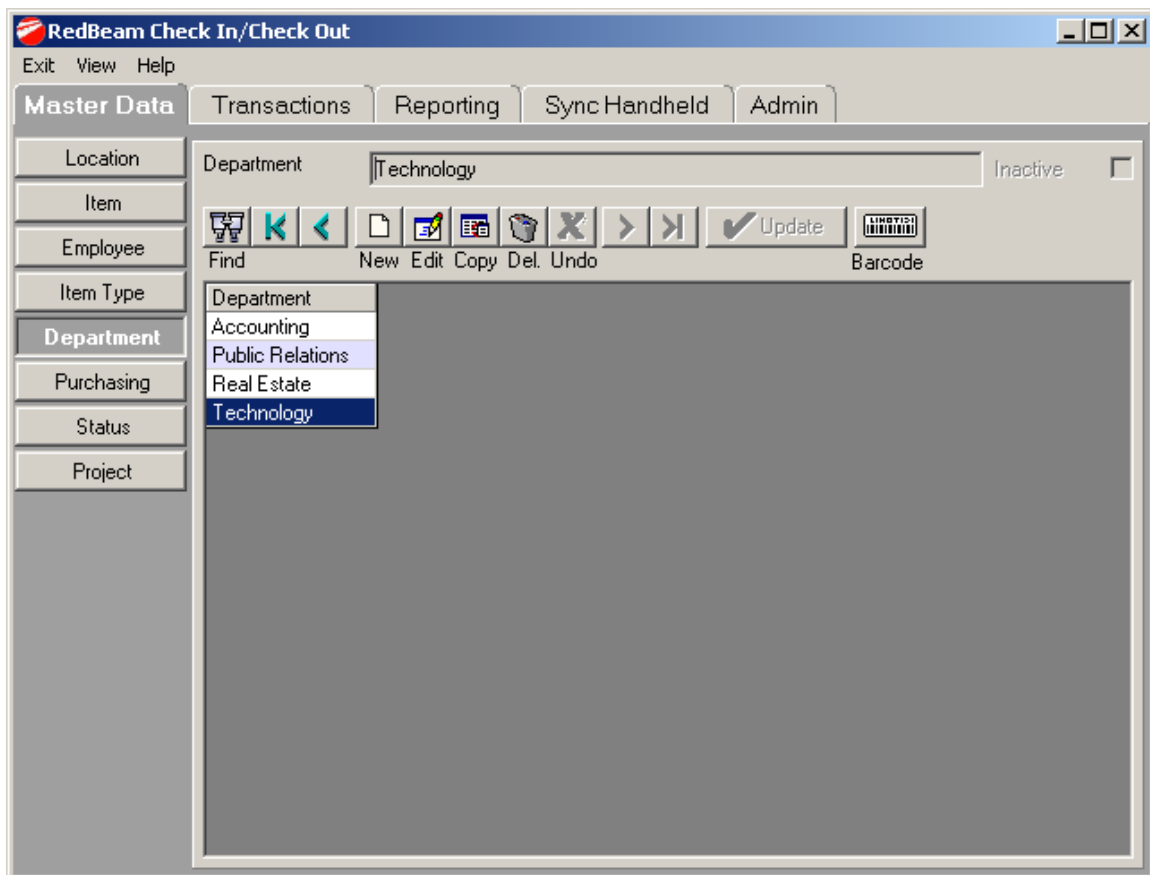
To create a new department, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing department, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a department, first reassign employees assigned to the department to a different department. Then click on the *Delete* button and confirm the deletion when prompted.

To make a department inactive, click the *Inactive* check box. This will remove the department from drop-down lists in the system, but will keep the entry in department master data and reporting.

You can view all of the departments by scrolling through the list on the bottom panel.



Purchasing

To set up your purchasing information, click on the *Purchasing* button. Purchasing includes units of measure, vendors, manufacturers, and models.

Unit of Measure

To set up units of measure, click on the *Unit of Measure* tab. A unit of measure is the unit in which an item is checked in and checked out.

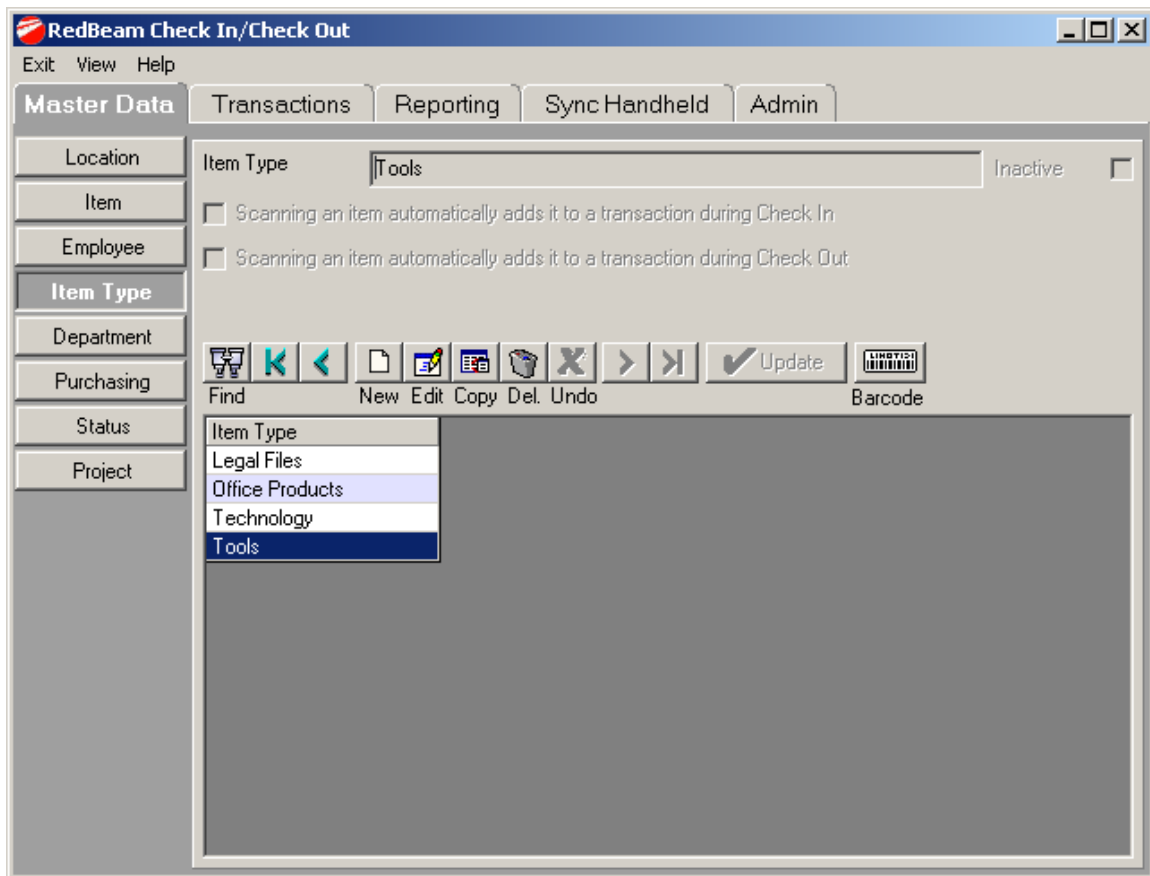
To create a new unit of measure, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing unit of measure, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a unit of measure, first disassociate the unit of measure from all items. Then click on the *Delete* button and confirm the deletion when prompted.

To make a unit of measure inactive, click the *Inactive* check box. This will remove the entry from drop-down lists, but will keep the entry in unit of measure master data and reporting.

You can view all of the units of measure by scrolling through the list on the bottom panel.



Vendor

To set up vendors, click on the *Vendor* tab. A vendor is the company or organization from whom the item was purchased.

To create a new vendor, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing vendor, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a vendor, first disassociate the vendor from all items. Then click on the *Delete* button and confirm the deletion when prompted.

To make a vendor inactive, click the *Inactive* check box. This will remove the vendor from drop-down lists in the system, but will keep the entry in vendor master data and reporting.

You can view all of the vendors by scrolling through the list on the bottom panel.

The screenshot shows the RedBeam Check In/Check Out software interface. The title bar reads "RedBeam Check In/Check Out". The menu bar includes "Exit", "View", and "Help". The main window has several tabs: "Master Data", "Transactions", "Reporting", "Sync Handheld", and "Admin". The "Master Data" tab is active, and within it, the "Vendor" sub-tab is selected. On the left side of the "Master Data" tab, there is a vertical list of categories: "Location", "Item", "Employee", "Item Type", "Department", "Purchasing", "Status", and "Project". The "Purchasing" category is highlighted. The main area of the window is a form for entering vendor information. The form fields are organized as follows: "Unit Of Measure" (set to "Vendor"), "Vendor" (text field with "Light Arm Industries"), "Phone" (text field with "968-153-7894"), "Alt. Phone" (text field with "968-153-4195"), "City" (text field with "Verse"), "State" (dropdown menu with "MA" selected), "Zip Code" (text field with "15986-9876"), "Contact" (text field with "Richard Wilbur"), "Street" (text field with "9876 Catch St."), "Email" (text field with "Richard@LightArm.com"), and an "Inactive" checkbox which is currently unchecked. Below the form fields is a toolbar with icons for "Find", "New", "Edit", "Copy", "Del.", "Undo", "Update", and "Barcode". At the bottom of the window is a table listing vendors. The table has columns: "Vendor", "Vendor No", "Contact", "Phone", "Alt Phone", "Address", and "Addr". The first row of data is: "Light Arm Industries", "10a", "Richard Wilbur", "968-153-7894", "968-153-4195", "9876 Catch St.", and "Addr".

Vendor	Vendor No	Contact	Phone	Alt Phone	Address	Addr
Light Arm Industries	10a	Richard Wilbur	968-153-7894	968-153-4195	9876 Catch St.	Addr

Manufacturer

To set up manufacturers, click on the *Manufacturer* tab. A manufacturer is the company or organization that originally produced the item.

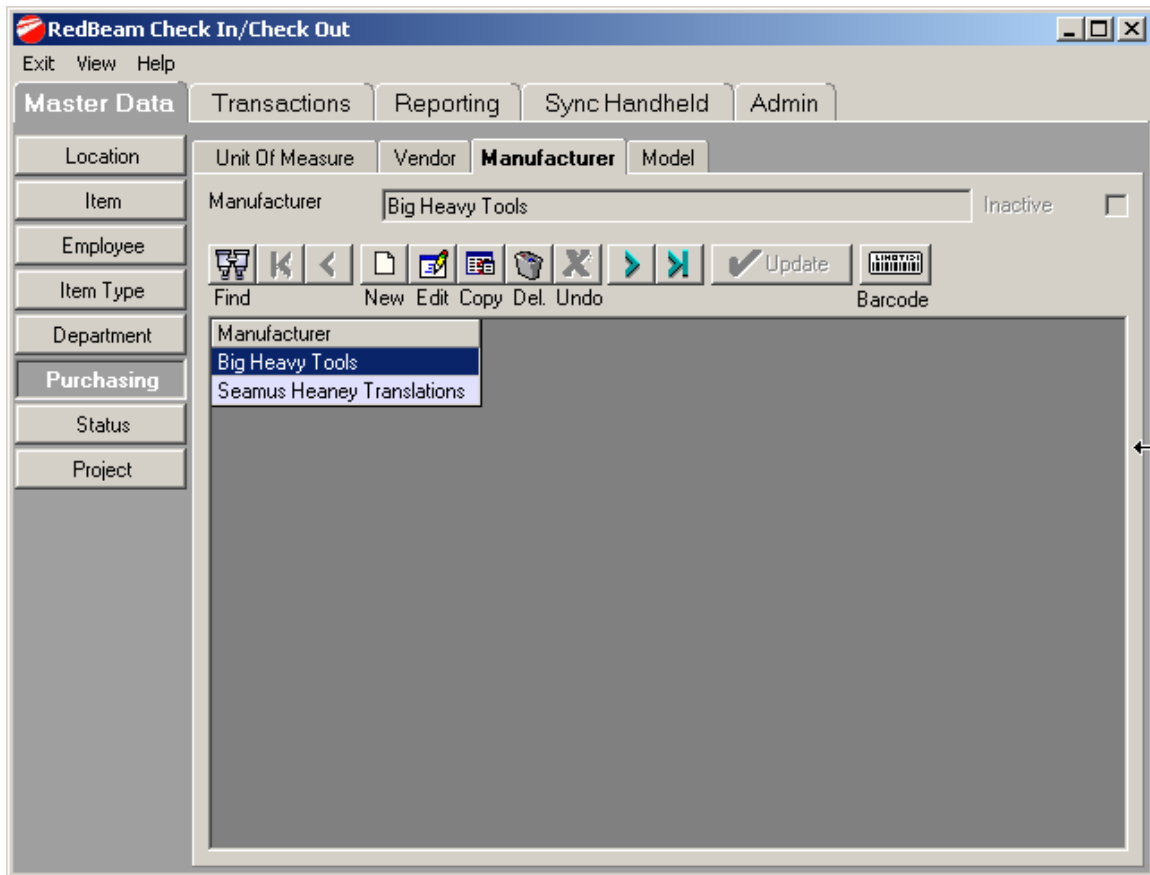
To create a new manufacturer, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing manufacturer, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a manufacturer, first delete any model numbers assigned to the manufacturer and disassociate items from the Manufacturer. Then click on the *Delete* button and confirm the deletion when prompted.

To make a manufacturer inactive, click the *Inactive* check box. This will remove the manufacturer from drop-down lists in the system, but will keep the entry in manufacturer master data and reporting.

You can view all of the manufacturers by scrolling through the list on the bottom panel.



Model

To set up model, click on the *Model* tab. A model is a specific kind of product made by a manufacturer. If you assign a manufacturer to a model number, you will be able to limit the list of model numbers to select from in your item record to those for the desired manufacturer.

To create a new model, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing model, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a model, first disassociate items from the model. Then click on the *Delete* button and confirm the deletion when prompted.

To make a model inactive, click the *Inactive* check box. This will remove the model from drop-down lists in the system, but will keep the entry in model master data and reporting.

You can view all of the models by scrolling through the list on the bottom panel.

The screenshot shows the RedBeam Check In/Check Out software interface. The title bar reads "RedBeam Check In/Check Out". The menu bar includes "Exit", "View", and "Help". The main window has several tabs: "Master Data", "Transactions", "Reporting", "Sync Handheld", and "Admin". The "Master Data" tab is active, and within it, the "Model" sub-tab is selected. On the left side, there is a vertical list of categories: "Location", "Item", "Employee", "Item Type", "Department", "Purchasing", "Status", and "Project". The "Purchasing" category is currently selected. The main area of the window contains a form for entering model information. It includes fields for "Unit Of Measure", "Vendor", "Manufacturer", and "Model". The "Model" field contains the text "DWET544G8". The "Manufacturer" field contains "Big Heavy Tools". There is an "Inactive" checkbox which is currently unchecked. Below the form is a toolbar with icons for "Find", "New", "Edit", "Copy", "Del.", and "Undo", along with an "Update" button and a barcode icon. At the bottom of the window, there is a table listing models:

Model	Manufacturer
Beowulf	Seamus Heaney Translations
DWET544G8	Big Heavy Tools
M516DE	Big Heavy Tools

Status

To set up item status information, click on the *Status* button. A status is used to indicate the condition or state of the item. For example a status could be "*New Condition*", "*Good Condition*", or "*Poor Condition*".

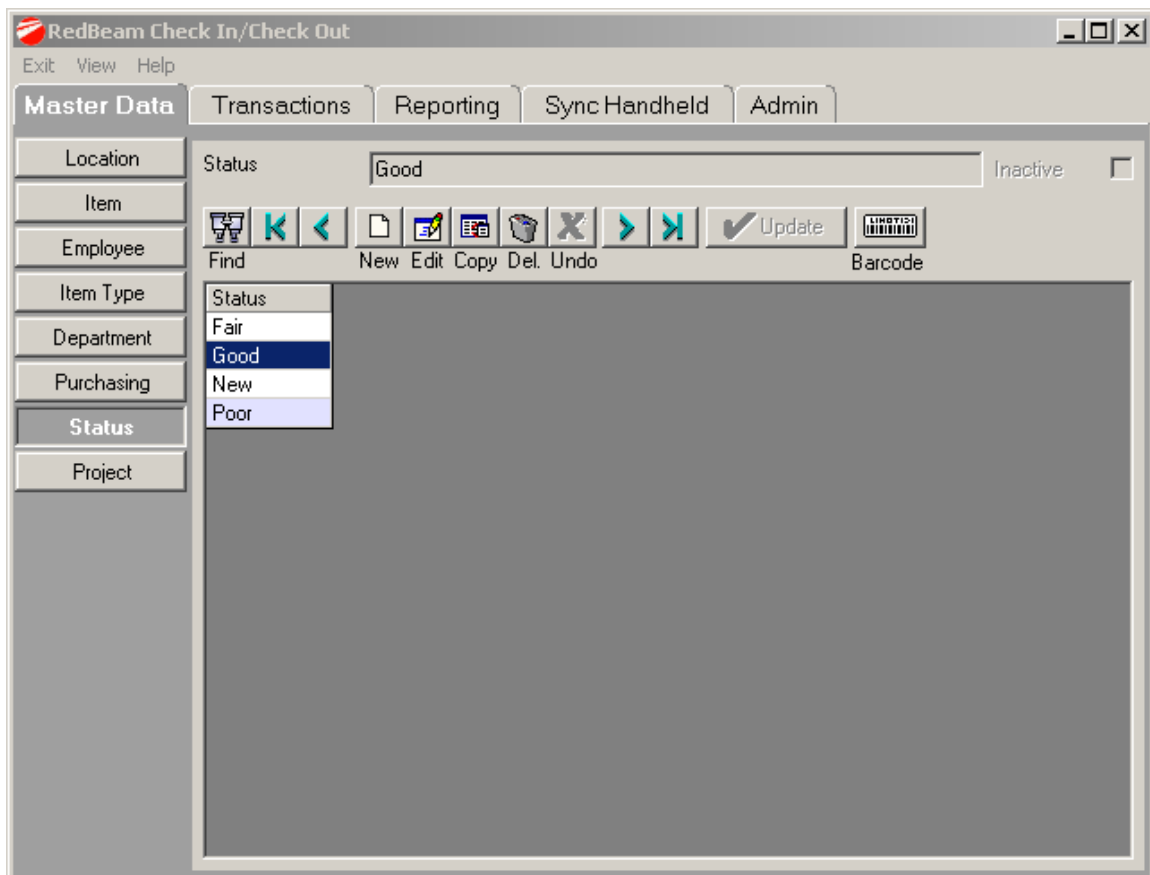
To create a new status, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing status, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a status, first disassociate items from the status. Then click on the *Delete* button and confirm the deletion when prompted.

To make a status inactive, click the *Inactive* check box. This will remove the status from drop-down lists in the system, but will keep the entry in status master data and reporting.

You can view all of the statuses by scrolling through the list on the bottom panel.



Project

To set up projects that items can be checked out to, click on the *Project* button.

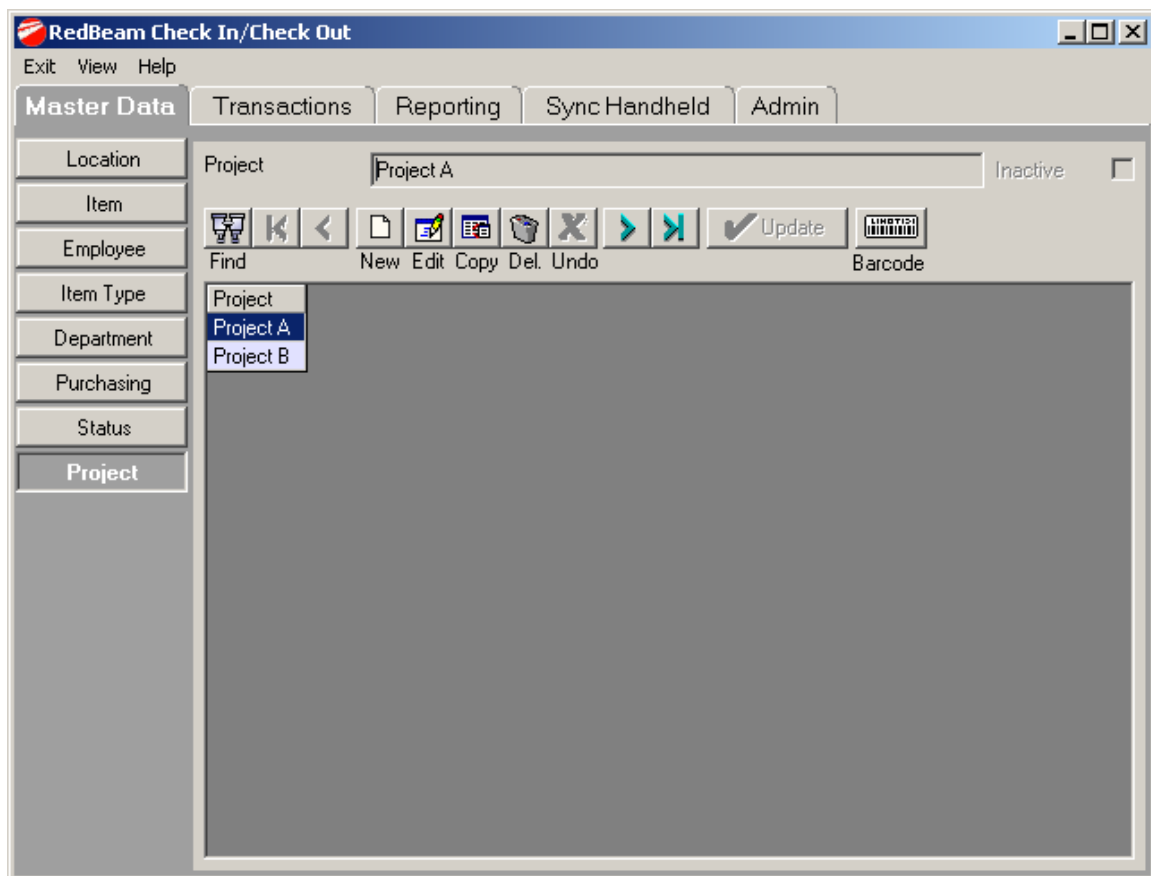
To create a new project, click the *New* button and enter the information. When finished, click the *Add* button.

To edit an existing project, click the *Edit* button and update the information. When finished, click the *Update* button.

To delete a project, first check in any items associated with the project. Then click on the *Delete* button and confirm the deletion when prompted.

To make a project inactive, click the *Inactive* check box. This will remove the project from drop-down lists in the system, but will keep the entry in project master data and reporting.

You can view all of the projects by scrolling through the list on the bottom panel.



Transactions

The *Transactions* tab is where items are checked out and checked in. The *Transactions* tab is also where check out fees and overdue fees are paid.

Check Out – checks an item out of a location to an employee

Check In – checks an item back in to a location

Fee Pay – allows payment of check out or overdue fees owed by an employee

Reserve – reserves an item for an employee

Reservations – allows viewing or deleting of reserved items

Check Out

To check out an item, click on the *Check Out* button on the left side of the *Transactions* screen.

The date and time of the transaction will default to the current date and time.

Optionally, a reference number such as an order number can be entered in the *Reference No* field.

The room from which the item is being checked out may be selected by scanning into the *Room Barcode* field or by selecting the barcode ID from the drop-down list. Alternatively select a room from the *Select a Room* tree structure or choose from the *Room Description* drop-down list.

The employee checking out the item may be selected by scanning the employee's barcode into the *Employee ID* field or by selecting the ID from the drop-down list. Alternatively, select the name of the employee from the *Employee Name* drop-down list.

The barcode ID of the item being checked out may be selected by scanning the barcode into the *Item Barcode* field. Alternatively, the item barcode or description can be found using the search function. To access the search click the binoculars icon.

Specify the status of the item by selecting from the *Status* drop-down list. Notes specific to the item may also be added in the *Note* field. These will display on the receipt and on the transaction reports. If this item is being checked out to a specific project, select the project ID from the drop-down list.


If the *Allow Changes At Check Out* check box is checked in the item master record, the *Fee/Period Override* box will be displayed during check out. The data in these fields will default from the master record. If desired, enter a different period type, quantity, or fee. You may also choose whether weekends count towards the time items are checked out.

To add to an item to this check out transaction, click the *Add Item +* button. The item will display in the box at the bottom of the screen. You may add multiple items to a transaction before completing it. You may also remove an item at anytime before updating the transaction by clicking on the item in the box at the bottom of the screen and clicking the *Remove Item -* button.

Adding or removing items will update the *Total* fee at the bottom of the screen. If fees are due, enter the amount the employee has paid in the *Paid* field. If paying more than the total, the change due will display in the *Change* field. If a printed receipt is desired, place a check in the *Print a Receipt* check box.

When all of the items have been added, save the transaction by clicking the *Update* button. If the *Print a Receipt* checkbox is filled, a receipt will be sent to the default printer.

The *Clear* button will reset all the data on the screen with the exception of the room.


RedBeam Check In/Check Out

Exit View Help

Master Data
Transactions
Reporting
Sync Handheld
Admin

Check Out
Check In
Fee Pay
Reserve
Reservations

Update Time
9 /10/2007
12:17 PM

Room
Barcode
Loc1
Description
Location 1

Select a Room:

My Company

Legal Building
Location 1
Location 2
Location 3

Physical Plant Facility
Location 4
Location 5
Location 6

Project ID
Project A

Due

Item Barcode

Item Description

Print a Receipt
☐
☒
Clear

Reference No
Employee
ID
e1
Name
Vandelay, Art
Item
Barcode
T11
Description
Big Heavy Drill
Status
Good
Note
Includes spare battery.

Remove Item
Add Item

☒ Update

Check In

To check an item in, click on the *Check In* button on the left side of the *Transactions* screen.

The day and time of the transaction will default to the current day and time.

The room to which the item is being checked in may be selected by scanning into the *Room Barcode* field or by selecting the barcode ID from the drop-down list. Alternatively select a room from the *Select a Room* tree structure or choose from the *Room Description* drop-down list.

The barcode ID being checked in may be selected by scanning the barcode ID into the *Item Barcode* field or by selecting the barcode ID from the drop-down list. Alternatively, the item barcode or description can be found using the search function. To access the search click the binoculars icon.

Specify the status of the item by selecting from the Status drop-down list.

Notes specific to the item may also be added in the *Note* field. These will display on the receipt and on the transaction reports.

To add to an item to this check in transaction, click the *Add Item +* button. The item will display in the box at the bottom of the screen. You may add multiple items to a transaction before

completing it. You may also remove an item at anytime before updating the transaction by clicking on the item in the box at the bottom of the screen and clicking the *Remove Item* - button.

Adding or removing items will update the *Total* fee at the bottom of the screen. Fees will include any unpaid check out fees and overdue fees for the items being checked in. If fees are due, enter the amount the employee has paid in the *Paid* field. If paying more than the total, the change due will display in the *Change* field. If a printed receipt is desired, place a check in the *Print a Receipt* check box.

When all of the items have been added, save the transaction by clicking the *Update* button. If the *Print a Receipt* checkbox is filled, a receipt will be sent to the default printer.

The *Clear* button will reset all the data on the screen (with the exception of the room).

Fee Pay

To pay a fee, click on the *Fee Pay* button on the left side of the *Transactions* screen.

You may select the employee paying the fee by scanning the employee's barcode into the *Employee ID* field or by selecting the ID from the drop-down list. Alternatively, select the name of the employee from the *Employee Name* drop-down list.

Fees to be paid for that employee will be grouped in the grid in the middle of the screen. Fees will include any unpaid check out fees and overdue fees.

The screenshot shows the RedBeam Check In/Check Out application window. The 'Transactions' tab is active. On the left sidebar, the 'Fee Pay' button is highlighted. The main area contains two dropdown menus: 'Employee ID' with 'e1' selected and 'Employee Name' with 'Vandelay, Art' selected. Below these is a table of unpaid fees:

Department	Employee ID	Employee Name	Unpaid Fee
Accounting	e1	Vandelay, Art	\$12.00
Technology	e3	Johnson, Peter	\$125.00

At the bottom of the window, there is a 'Print a Receipt' checkbox (checked), a 'Total' field showing '\$12.00', a 'Paid' field showing '\$6.00', a 'Change' field showing '\$0.00', and an 'Update' button with a green checkmark icon.

The total fees due for the employee will display in the *Total* field at the bottom of the screen. If fees are due, enter the amount the employee has paid in the *Paid* field. If paying more than the total, the change due will display in the *Change* field. If a printed receipt is desired, place a check in the *Print a Receipt* check box.

Save the transaction by clicking the *Update* button. If the *Print a Receipt* checkbox is filled, a receipt will be sent to the default printer.

Reserve

To reserve an item, click on the *Reserve* button on the left side of the *Transactions* screen.

Optionally, a reference number such as an order number can be entered in the *Reference No* field.

The room from which the item is being reserved may be selected by scanning into the *Room Barcode* field or by selecting the barcode ID from the drop-down list. Alternatively select a room from the *Select a Room* tree structure or choose from the *Room Description* drop-down list.

The employee reserving the item may be selected by scanning the employee's barcode into the *Employee ID* field or by selecting the ID from the drop-down list. Alternatively, select the name of the employee from the *Employee Name* drop-down list.

The barcode ID of the item being reserved may be selected by scanning the barcode into the *Item Barcode* field. Alternatively, the item barcode or description can be found using the search function. To access the search click the binoculars icon.

The length of reservation is assigned by selecting the *Reserve From* and *Reserve To* from the drop-down list.

The screenshot displays the RedBeam Check In/Check Out application window. The 'Transactions' tab is active, and the 'Reserve' button is highlighted in the left-hand navigation pane. The main interface is divided into several sections: a top menu bar with 'Exit', 'View', and 'Help'; a sub-menu bar with 'Master Data', 'Transactions', 'Reporting', 'Sync Handheld', and 'Admin'; and a central form area. The form includes fields for 'Reference No', 'Room' (with 'Barcode' and 'Description' dropdowns), 'Employee' (with 'ID' and 'Name' dropdowns), 'Item' (with 'Barcode' and 'Description' dropdowns), and 'Reserve' (with 'From' and 'To' date/time dropdowns). A 'Note' field is also present. Below these fields is a 'Project ID' dropdown and buttons for 'Remove Item' and 'Add Item'. At the bottom, there is a table with columns for 'Item Barcode', 'Item Description', and 'Location Barcode', and a 'Print a Receipt' checkbox with a 'Clear' button. An 'Update' button is located in the bottom right corner.

Notes specific to the item may also be added in the *Note* field. These will display on the receipt and on the transaction reports. If this item is being reserved to a specific project, select the project ID from the drop-down list.

To add to an item to this reserve transaction, click the *Add Item +* button. The item will display in the box at the bottom of the screen. You may add multiple items to a transaction before completing it. You may also remove an item at anytime before updating the transaction by clicking on the item in the box at the bottom of the screen and clicking the *Remove Item -* button.

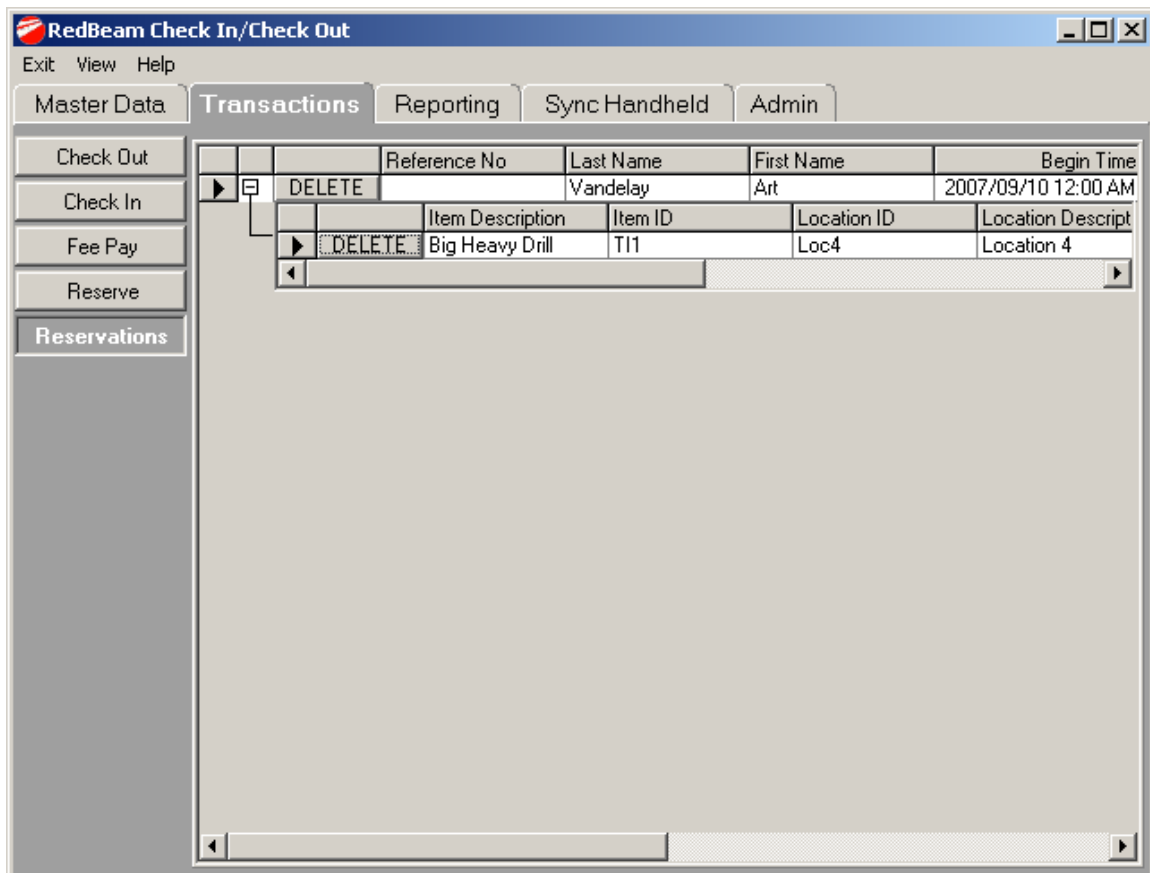
When all of the items have been added, save the transaction by clicking the *Update* button. If the *Print a Receipt* checkbox is filled, a receipt will be sent to the default printer.

The *Clear* button will reset all the data on the screen with the exception of the room.

Reservations

To view a reservation, click on the *Reservations* button on the left side of the *Transactions* screen.

The side panel is a tree structure that allows you to view the reservations for employees. You can expand or close the tree by clicking on the plus and minus icons next to the information you want to view.



Delete the reservation by clicking the *Delete* button. Click on the *Delete* button and confirm the deletion when prompted.

Reporting

To access the reporting features of the system, click on the *Reporting* tab. There are four different categories of reports available. They include:

Master Data – a list of data entered under the master data tab of the system

Item Data – reports on checked out/in items, overdue items, item usage, and item and rental value

Transactions – detailed information about item transactions

Label Printing – label printing functions

Click on the button on the left side of the menu to select the desired report category.

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Reporting' tab is selected in the top menu. On the left, a vertical menu lists 'Master Data', 'Item Data', 'Transactions', and 'Label Printing'. Under 'Item Data', there are radio buttons for 'Checked Out' (selected), 'Checked In', 'Overdue', 'Usage', 'Item Value', and 'Rental Value'. Below this is a 'Display Options' section with checkboxes for 'User Fields' and 'Purchasing Data'. The main area is titled 'Filter Options' and contains a list of fields: 'Acquisition Date', 'Check Out Actual Time', 'Department', 'Check Out Effective Time', 'Employee', 'Item', 'Item Type', 'Manufacturer', 'Model', 'Project', and 'Room'. To the right of this list is a 'Select a Date Range' section with 'From' and 'To' date and time pickers. At the bottom, there are 'Group By' and 'Second Group By' dropdowns, each with a 'Descending' checkbox. The 'Export' section at the bottom has radio buttons for 'Excel' (selected) and 'Text File', and a printer icon.

Report Generation Overview

For each category of reports, you will select a report type, scope and grouping. Once the report type, scope and grouping are selected, click the *Print* button. The selected report will display.

To print a hardcopy of the report, click the printer button on the left side of the menu bar.



To export a copy of the report, click the *Export Report* (envelope) icon to the right of the printer icon.

To display or hide the report structure to the left side of the page, click the *Toggle Group Tree* icon to the right of the *Export Report* icon. When this tree structure is displayed, clicking on any level in the tree will display the selected section in the report.

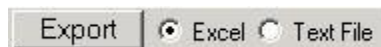
To move from page to page within a report, use the right and left arrow buttons to the right of the printer icon.

To search for specific information in a report, click on the *Search Text* (binocular) icon and enter the desired information.

To exit out of the report and go back to the application, click on *Exit* at the top left of the report, or click the X in the to right hand corner of the report.

Exporting the Report Data

Once the report type and scope are selected, select the radio button to export to *Excel* or to a *Text File* and click the *Export* button.



You will be asked to name and save the file on a directory on your computer. Once the file is saved, you will be asked if you would like to open the file.

Master Data Reports

Master data reports provide a detailed list of data entered under the master data tab of the system. To access the master data reports, click on the *Master Data* button on the left side of the menu. Select from the following report types by clicking the radio button next to your selection:

- Building List* – a list of all buildings
- Room List* – a list of all rooms
- Item List* – a list of all items
- Item And Barcode* – a barcoded catalog of items
- Item Type List* – a list of all item types
- Vendor List* – a list of all vendors
- Manufacturer List* – a list of all manufacturers
- Model List* – a list of all models
- Employee List* – a list of all employees
- Department List* – a list of all departments
- Status List* – a list of all statuses
- Project List* – a list of all projects

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Reporting' tab is selected in the top menu. On the left, the 'Master Data' button is highlighted. Below it, a list of report types is shown with radio buttons. 'Item Type List' is selected. To the right, the 'Filter Options' section shows 'Item Type' set to 'All'. Below this is a table with columns 'Select' and 'Item Type'. The table lists 'Office Products', 'Legal Files', 'Technology', and 'Tools'. At the bottom, there are 'Group By' and 'Second Group By' dropdown menus, both set to 'Descending'. An 'Export' button is at the bottom left, and a printer icon is at the bottom right.

RedBeam Check In/Check Out

Exit Help

Master Data Transactions Reporting Sync Handheld Admin

Master Data

Item Data

Transactions

Label Printing

Building List

Room List

Item List

Item And Barcode

Item Type List

Vendor List

Manufacturer List

Model List

Employee List

Department List

Status List

Project List

Filter Options

Item Type ☒ All ☐ Selected

Select All Deselect All

Select	Item Type
<input type="checkbox"/>	Office Products
<input type="checkbox"/>	Legal Files
<input type="checkbox"/>	Technology
<input type="checkbox"/>	Tools

Display Options

☐ User Fields

☐ Purchasing Data

Group By : Descending

Second Group By : Descending

Export ☒ Excel ☐ Text File

Once the report type is selected, you can narrow the scope of the report by selecting one or more *Filter Options*. Within each filter option, you can choose either “All” or “Selected” records. To choose specific records, click “Selected” and put a check mark next to the desired records by clicking in the appropriate check boxes. Use the *Select All* and *Deselect All* functions to make selecting the specific records easier.

To group the data in the reports, you may select values from the drop-down lists at the bottom of the screen. You may also decide to display the data in descending order.

If additional data is available to be displayed in the reports, you can check the boxes of the data you would like to see in the report under the *Display Options* section.

When finished, click the printer icon. To export to *Excel* or a *Text* file, select the appropriate radio button at the bottom of the screen and click *Export*.

RedBeam Check In/Check Out

Exit Help

Master Data Transactions Reporting Sync Handheld Admin

Master Data

- Building List
- Room List
- Item List
- Item And Barcode
- Item Type List**
- Vendor List
- Manufacturer List
- Model List
- Employee List
- Department List
- Status List
- Project List

Display Options

- ☐ User Fields
- ☐ Purchasing Data

Filter Options

Item Type ☒ All ☐ Selected

Select All Deselect All

Select	Item Type
<input type="checkbox"/>	Office Products
<input type="checkbox"/>	Legal Files
<input type="checkbox"/>	Technology
<input type="checkbox"/>	Tools

Group By : ☐ Descending

Second Group By : ☐ Descending

Export ☒ Excel ☐ Text File

Item Data Reports

Item data reports provide detailed information about checked out items, checked in items, overdue items, item usage, item value and rental value. To access the item data reports, click on the *Item Data* button on the left side of the menu. Select from the following report types by clicking the radio button next to your selection:

Checked Out – a list of items checked out

Checked In – a list of items not checked out to employees

Overdue – a list of items overdue

Usage – a report detailing how often items are used

Item Value – a report detailing the value of items based on cost in the item master

Rental Value – a report detailing check out and overdue fees charged for items

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Reporting' tab is selected. On the left, the 'Item Data' report type is chosen. The 'Filter Options' section includes a list of fields (Acquisition Date, Check Out Actual Time, Department, Check Out Effective Time, Employee, Item, Item Type, Manufacturer, Model, Project, Room) and a 'Select a Date Range' section with 'From' and 'To' date and time pickers. The 'Display Options' section has checkboxes for 'User Fields' and 'Purchasing Data'. At the bottom, there are 'Group By' and 'Second Group By' dropdowns, each with a 'Descending' checkbox. An 'Export' button is present, with radio buttons for 'Excel' (selected) and 'Text File'. A printer icon is in the bottom right corner.

Once the report type is selected, you can narrow the scope of the report by selecting one or more *Filter Options*. Within each filter option, you can choose either “All” or “Selected” records. To choose specific records, click “Selected” and put a check mark next to the desired records by clicking in the appropriate check boxes. Use the *Select All* and *Deselect All* functions to make selecting the specific records easier.

To group the data in the reports, you may select values from the drop-down lists at the bottom of the screen. You may also decide to display the data in descending order.

If additional data is available to be displayed in the reports, you can check the boxes of the data you would like to see in the report under the *Display Options* section.

When finished, click the printer icon. To export to *Excel* or a *Text* file, select the appropriate radio button at the bottom of the screen and click *Export*.

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Reporting' tab is selected. On the left, a sidebar contains 'Master Data', 'Item Data', 'Transactions', and 'Label Printing'. The 'Item Data' section is active, showing radio buttons for 'Checked Out' (selected), 'Checked In', 'Overdue', 'Usage', 'Item Value', and 'Rental Value'. Below this is the 'Display Options' section with checkboxes for 'User Fields' and 'Purchasing Data'. The main area is titled 'Filter Options' and includes a list of filterable fields: 'Acquisition Date', 'Check Out Actual Time', 'Department', 'Check Out Effective Time', 'Employee', 'Item', 'Item Type', 'Manufacturer', 'Model', 'Project', and 'Room'. To the right of this list is a 'Select a Date Range' section with 'All' (selected) and 'Selected' radio buttons, and 'From' and 'To' date/time pickers. At the bottom of the filter options are 'Group By' and 'Second Group By' dropdowns, each with a 'Descending' checkbox. The bottom of the window features an 'Export' button, radio buttons for 'Excel' (selected) and 'Text File', and a printer icon.

Transaction Reports

The *Transaction* reports list date and time stamped records of transactions. To access the transaction reports, click on the *Transactions* button on the left side of the menu. Select from the following report types by clicking the radio button next to your selection:

Check Out – item check out detail

Check In – item check in detail

Reserve – item reservation detail

All Transactions – a list of all transactions in date and time stamp order

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Reporting' tab is selected. On the left, a sidebar contains buttons for 'Master Data', 'Item Data', 'Transactions' (highlighted), and 'Label Printing'. The 'Transactions' section has four radio buttons: 'Check Out' (selected), 'Check In', 'Reserve', and 'All Transactions'. Below this is the 'Display Options' section with checkboxes for 'User Fields' and 'Purchasing Data'. The main area is titled 'Filter Options' and includes a list of filterable fields: Acquisition Date, Actual Time, Department, Employee, Item, ItemType, Manufacturer, Model, Project, and Reference No. To the right of these fields are date and time pickers for 'From' (9/10/2007 12:00 AM) and 'To' (9/10/2007 11:59 PM). At the bottom of the filter options are 'Group By' and 'Second Group By' dropdowns, each with a 'Descending' checkbox. The bottom of the window features an 'Export' button, radio buttons for 'Excel' (selected) and 'Text File', and a printer icon.

Once the report type is selected, you can narrow the scope of the report by selecting one or more *Filter Options*. Within each filter option, you can choose either “*All*” or “*Selected*” records. To choose specific records, click “*Selected*” and put a check mark next to the desired records by clicking in the appropriate check boxes. Use the *Select All* and *Deselect All* functions to make selecting the specific records easier.

To group the data in the reports, you may select values from the drop-down lists at the bottom of the screen. You may also decide to display the data in descending order.

If additional data is available to be displayed in the reports, you can check the boxes of the data you would like to see in the report under the *Display Options* section.

When finished, click printer icon. To export to *Excel* or a *Text* file, select the appropriate radio button at the bottom of the screen and click *Export*.

Label Printing

To access the label printing functions, click on the *Label Printing* button.

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Reporting' tab is selected. On the left, a sidebar contains buttons for 'Master Data', 'Item Data', 'Transactions', and 'Label Printing' (which is highlighted). The main area is titled 'What to Print' and is divided into three columns: 'Single Label', 'From Master Data', and 'Sequential Printing'. Under 'Single Label', there is a section 'In the Barcode Print:' with radio buttons for 'Item ID' (selected), 'Room ID', and 'Employee ID'. Under 'From Master Data', there is a section 'Scope to Print:' with a list icon, a text field 'Select IDs to Print', and a checked checkbox 'or Print All'. Under 'Sequential Printing', there is a section '# of Labels to Print:' with a text field containing '3'. Below these columns, there is a section 'Above the Barcode Print' with two rows. Each row has radio buttons for 'Fixed Text' (selected) and 'From Field', followed by a text input field and a checked checkbox. The first row's text is 'This is the first line.' and the second row's text is 'This is the second line.'. To the right of this is a 'Barcode Preview' section with radio buttons for 'Display' and 'Hide' (selected). At the bottom, there is a 'Media' section with a dropdown 'Select Label Type' set to 'RedBeam Form #RB-L480 (1.75x1.25)', and text fields for 'Starting Column #' (1) and 'Starting Row #' (1). A printer icon is visible in the bottom right corner.


What to Print

When printing labels, you can enter the value of the barcode you want to print (*Single Label*), print from data you have already entered in the system (*From Master Data*) or print a series of sequentially numbered labels (*Sequential Printing*).

If you select *Single Label*, enter the value of the barcode you want to print and the total number of labels to be printed.

This is a close-up of the 'Single Label' column from the 'What to Print' section. It contains a text field 'Barcode to Print' with the value '002' and a text field '# of Labels to Print' with the value '1'.

If you select *From Master Data*, first choose the radio button to print either item, room or employee ID barcodes. Then select the printing scope by clicking the list icon under *Scope to Print*. The total number of labels to be printed will display.

Single Label	From Master Data	Sequential Printing
In the Barcode Print: <input checked="" type="radio"/> Item ID <input type="radio"/> Room ID <input type="radio"/> Employee ID	Scope to Print:  Select IDs to Print <input checked="" type="checkbox"/> or Print All	# of Labels to Print: <input type="text" value="3"/>

If you select *Sequential Printing*, enter barcode value with which you would like to start and end. You can enter a prefix that will be printed on all labels. You can also determine the number of digits after the prefix by checking the *Leading Zeros* check mark and entering the total number of digits desired. The number of labels to be printed will calculate automatically. If you would like to increment the barcodes more than one at a time, enter the increment in the *Increment* field. If the start value was 10 and the incremental was 2, the next several labels to print would be 10, 12, 14 and so on.

Single Label	From Master Data	Sequential Printing
Prefix <input type="text" value="AN"/> Start <input type="text" value="1"/> End <input type="text" value="10"/> Increment <input type="text" value="1"/>		
Leading Zeros <input checked="" type="checkbox"/> # of Digits <input type="text" value="4"/> # of Labels to Print <input type="text" value="10"/>		

Above the Barcode Print

For all printing, you can choose to print *Fixed Text* above your barcode. You may enter this text in the *First Line* and *Second Line* fields. Delete the sample text if you do not want to print anything above the barcode or uncheck the check mark to the right of the field.

If you are printing *From Master Data*, you can choose to either print *Fixed Text* or *From Field* by selecting the appropriate radio button. If you print *From Field*, you can choose from acquisition date, allow changes at checkout, check out fee, check out period, include weekends, item barcode ID, item description, item type, room ID, manufacturer, model, note, overdue interval fee, overdue period, period quantity, PO no, serial no, status, unit of measure or any of the 5 user fields to print above the barcode.

Above the Barcode Print	
First Line	<input checked="" type="radio"/> Fixed Text <input type="radio"/> From Field <input type="text" value="This is the first line."/> <input checked="" type="checkbox"/>
Second Line	<input checked="" type="radio"/> Fixed Text <input type="radio"/> From Field <input type="text" value="This is the second line."/> <input checked="" type="checkbox"/>

Media

Print barcodes to a standard laser printer by selecting one of the RedBeam forms from the Select Label Type drop down list, or if using a barcode label printer, choose the size desired. If using a RedBeam form, select the starting column and row where printing will begin on the sheet.

Change the height (H) and width (W) of the barcode by selecting from the dropdowns under *Barcode Size* section.

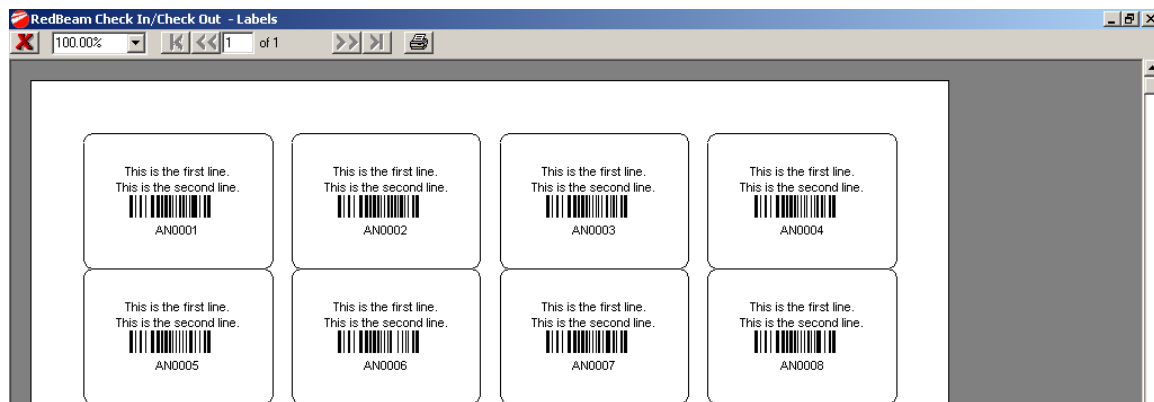
Select the font for the label by clicking on the *Select Font* button.



The screenshot shows a software window titled "Media". It contains several controls: a "Select Label Type" dropdown menu currently showing "RedBeam Form #RB-L480 (1.)", a "Starting Column #" input field with the value "1", and a "Starting Row #" input field with the value "1". To the right, there is a "Barcode Size" section with two dropdown menus for "H" (height) and "W" (width), both set to "100%". Further right is a "Select Font" button with a document icon containing the letter 'A'.

Select the font for the label by clicking on the *Select Font* button. Change the height (H) and width (W) of the barcode by selecting from the dropdowns under *Barcode Size* section.

When finished, click printer icon. You will preview the label sheet before printing. On the preview sheet, click the printer icon to print.



Sync Handheld

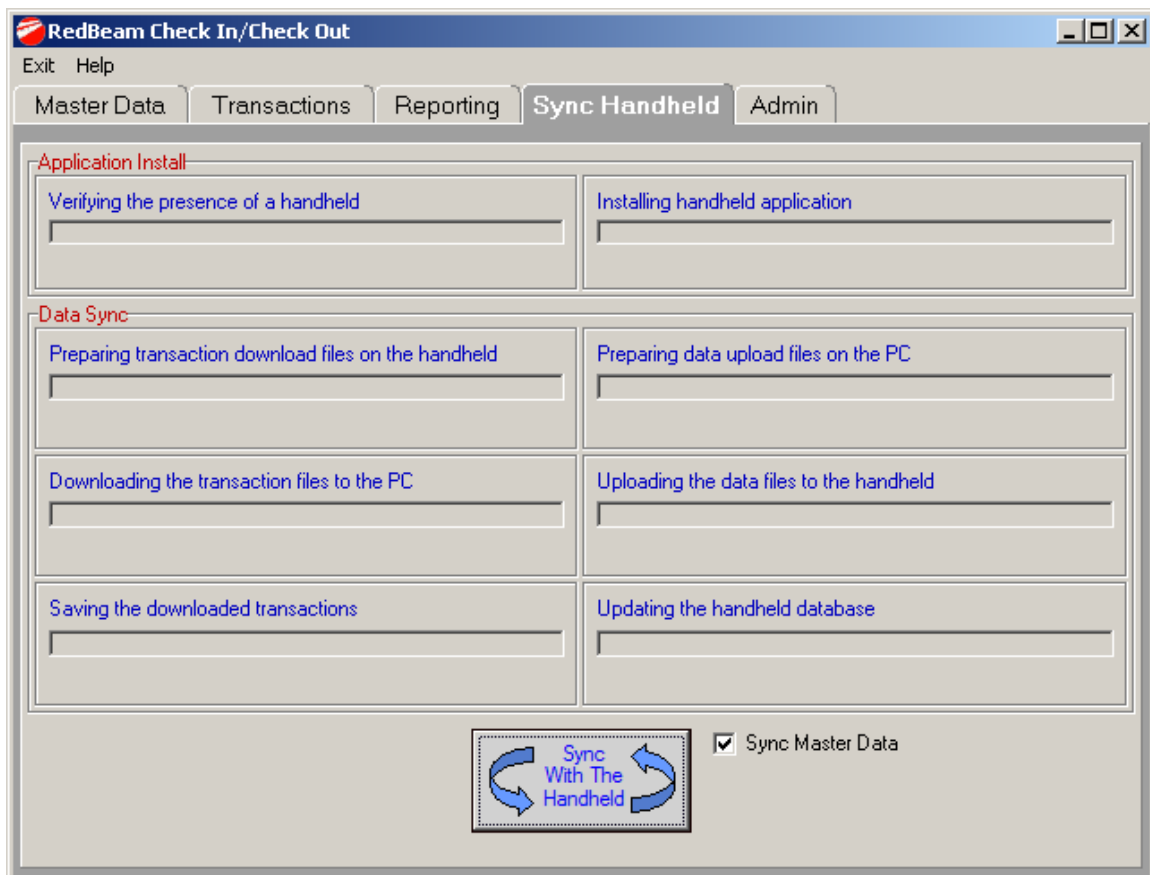
The *Sync Handheld* tab is where you sync the data between the PC and the scanner. This feature is only available in the *Mobile Edition* of the software.

To sync, place the scanner in the cradle and wait for Microsoft ® ActiveSync or Windows Mobile Device Center to connect. Then click on the *Sync With The Handheld* button on the bottom of the screen.

The system will first detect if upgrades are needed for your mobile software and install them.

The program will then check to see if there are transactions on the scanner to be downloaded to the PC. The blue bars moving on the left side of the screen will indicate the download of these files. If there are no files on the scanner, a message will pop up to notify you of this. If there are records on the scanner, they will be downloaded to the PC.

The program will then send all of the master data on the PC to the scanner to insure that the data is up to date. The blue bars moving on the right side of the screen will indicate the upload of these files.



Admin

To access the administrative features of the system, click on the *Admin* tab.

The administrative features include:

Network – networks database for use on multiple computers

Label Setup – allows for creation of new label sizes

Backup – backs up and restores database

Import Data – imports item and master data into the database

Purge Database – purges the database of item and master data records

Caption Override – changes master data titles throughout the system

Security – allows creation of users and roles that limit access in the system

The screenshot shows the 'RedBeam Check In/Check Out' application window. The 'Admin' tab is selected, and the 'Network' sub-tab is active. The main area is titled 'To network this machine to another SQL Server:'. It contains a text box for 'Enter a server name or IP address' with '127.0.0.1' entered. Below this is a button 'Search for Available Servers'. To the right are fields for 'User ID' (sa) and 'Password' (masked with asterisks). A large empty box is labeled 'and select one from the list:'. On the right side, it shows 'Current Server' as '127.0.0.1\RCD' and 'Current User' as 'sa'. A link 'Where is my server?' is present. At the bottom, there is a checkbox 'Use an SQL Server not installed by this application' and an 'Update' button with a green checkmark. A section titled 'Windows Firewall Ports' has a checked checkbox and a text box containing the text: 'Open local windows firewall ports for SQL communication with client machines. Ports will only be opened for the local network (subnet)'.

Network

If you are using a multi-user version of the software and would like to network PCs together, click on the *Network* tab. The network function allows you to network your system by pointing the application on your desktop to a database on another PC or server.

If you have not already installed the software on the PC or server that will house the central database (referred to as “server” in the rest of this section), please do so before continuing. Open the application on the server. You will be asked, “Will the data be stored on this machine?” Click “Yes”. This will create an instance of the Express version of Microsoft’s SQL database that comes with and is used by this software. You do not need a full version of Microsoft ® SQL to use this software. Once this is done, go back to the PC that you would like to network to this “server” database.

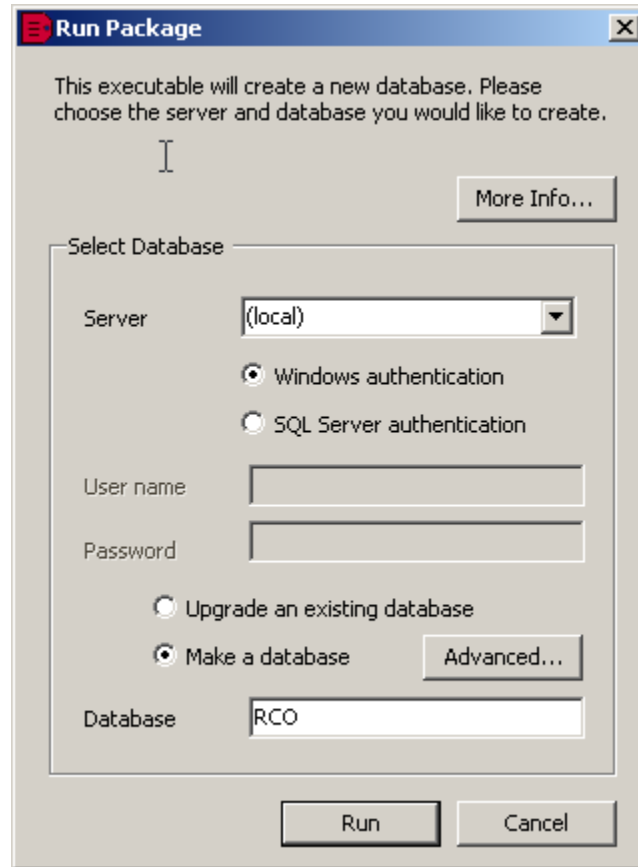
On the PC that you want to network, enter the server where your data is stored. Do this by clicking the *Search for Available Servers* button. When clicked, the system will look for other *RedBeam Check In/Check Out™* databases on your network. The server you just installed on should display in the box. Click to select it. (Alternatively, you may enter the server name or IP address.)

When finished, click the *Update* button. The data in the application will instantly be updated with the data in the newly selected database.

The screenshot shows the 'RedBeam Check In/Check Out' application window with the 'Admin' tab selected. The 'Network' sub-tab is active in the left sidebar. The main area is titled 'To network this machine to another SQL Server:'. It contains a text box for 'Enter a server name or IP address' with '127.0.0.1' entered. Below this is a button 'Search for Available Servers' and a label 'and select one from the list:' followed by a large empty box. To the right, there are fields for 'User ID' (containing 'sa') and 'Password' (containing masked characters). Below these, it shows 'Current Server' as '127.0.0.1\RCD' and 'Current User' as 'sa'. A link 'Where is my server?' is present. At the bottom, there is a checkbox 'Use an SQL Server not installed by this application' and an 'Update' button with a green checkmark. A section for 'Windows Firewall Ports' is at the very bottom, with a checked checkbox and text: 'Open local windows firewall ports for SQL communication with client machines. Ports will only be opened for the local network (subnet)'.

Advanced

If you are using your own full version of Microsoft® SQL Server 2000, 2005 or 2008, you will need to install the database to the SQL Server you would like to host the database. The database installation file may be found on the installation CD in the directory `\Utilities\Seed.exe`. Copy the file to a directory of your choice on the machine hosting SQL Server. Once in the directory, double click to execute the file and you will be presented with the following screen:

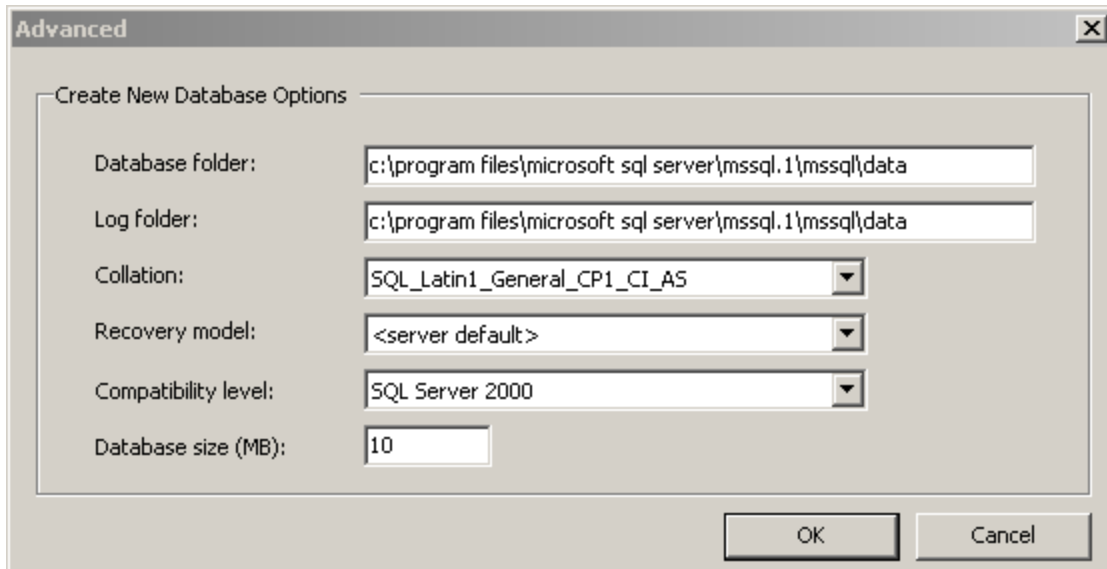


If you aren't using the "(local)" default instance, you may type the name or IP address of the SQL Server in the "Server" drop down box or you may click the down arrow to allow the application to search for eligible servers. If you are using a non-default instance of SQL Server be sure to include the instance name in your selection (i.e. *MachineName\InstanceName*).

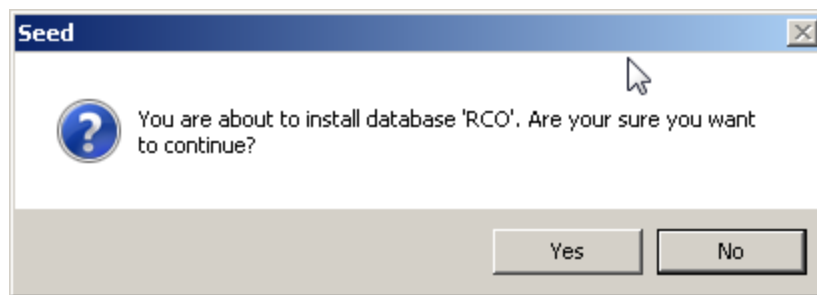
Leave the "Make a database" option selected and leave the database name as "RCO".

If you wish, you may specify an SQL Server security user name and password (with authority to create new databases) instead of the default windows authentication. If you do not have admin access to the SQL Server machine, this may be easiest.

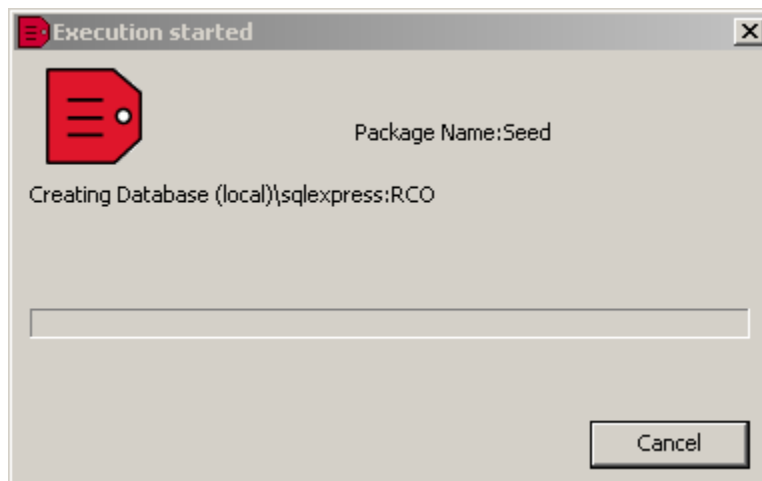
If you would like to store the database files in directory locations other than the defaults, you can change the file locations in the "Advanced" tab. **Do not** change the Collation on this screen.



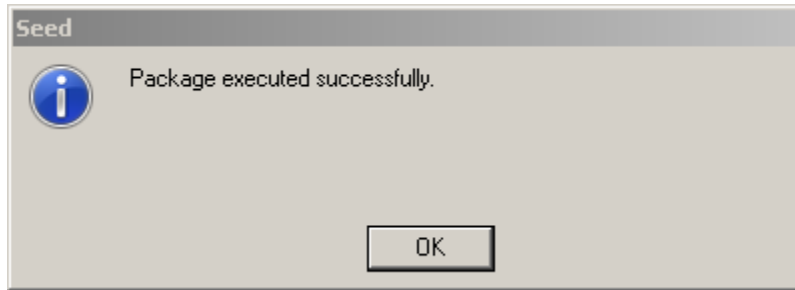
Click “Run.”



Click “Yes.”

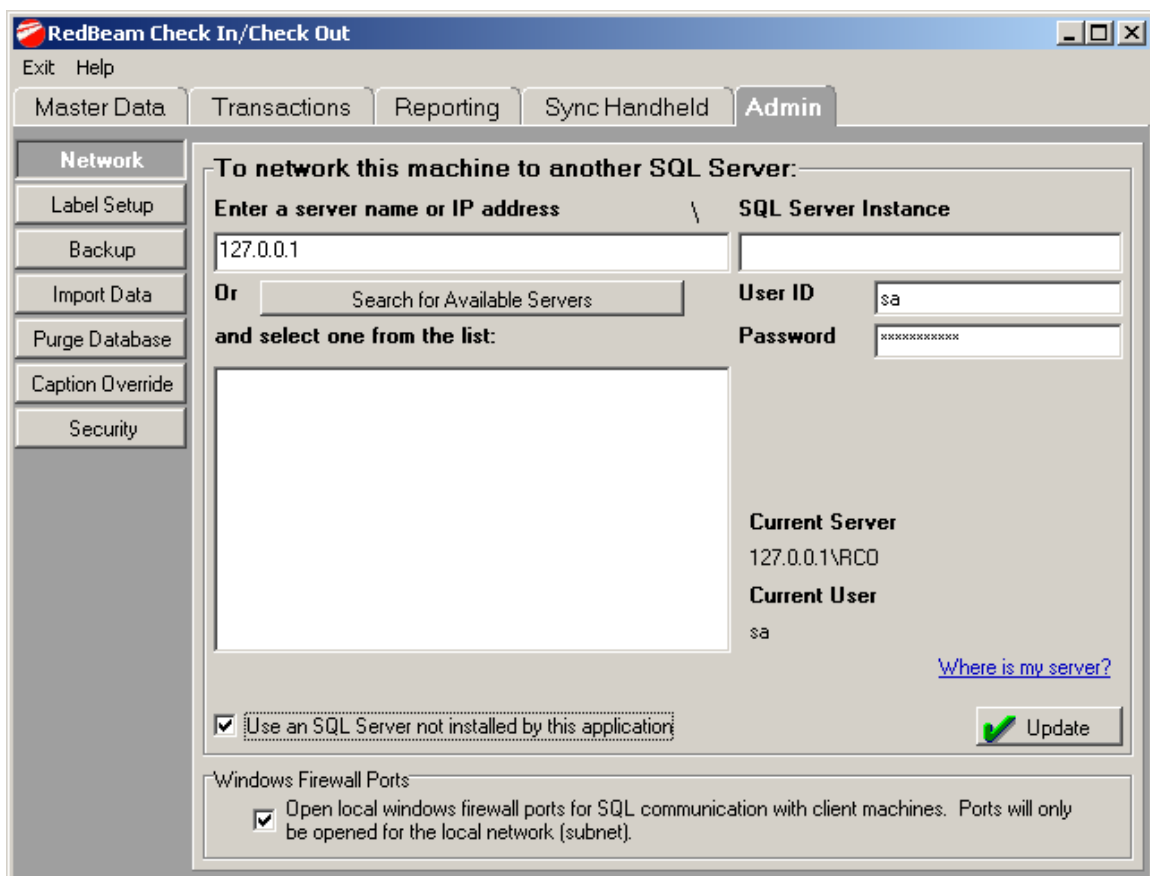


After the database had been created you will see the following:



Click "Ok".

Once the file is attached, check the *Use a SQL Server not installed by this application* check box at the bottom of the screen.



If you have not already done so, click *Search for Available Servers*. Choose the server from the list box or type the server name or IP address into the *New Server* field. When finished, click *Update*.

Why isn't my server found?

There are several reasons why you may not see your server when clicking the “Search for Available Servers” button:

You haven't installed or opened the application on the server yet:

The application must be installed and initiated on the server machine before your workstation can connect to it. If you have installed on the server, but you haven't opened the application on the server, the workstations will not be able to connect.

Your server is not on the same subnet as the workstation:

If your server is connected through a router, is in a different domain, is in a different workgroup, etc., it may not appear. You must manually enter the IP address or computer name of the server to connect. The computer name of the server can be found in the “System” application which is found in the windows Control Panel classic view of your server machine.

Your server is obstructed by a firewall:

This application is not designed for traffic through an unsecured network and should not be used in that context. The application is designed to automatically open ports (on the local subnet only) in the Windows operating system firewall (which ships with Windows XP). This firewall should not be your problem. If (for some reason) you have another internal firewall within a secure network, you will need to open two ports to allow the application to communicate. SQL Server uses UDP port 1434 to establish connections from SQL Server 2000 clients. (This socket number is also reserved for SQL Server by Internet Assigned Number Authority (IANA).) SQL also listens on a TCP port. The default number for a default instance is 1433, the official IANA socket number for SQL Server. In our case, we are using a "named instance" of SQL Server, and this port number may have been dynamically assigned when the instance was first started. To determine the port that our instance of SQL Server is listening on, you can use a Network Setup utility that was created by the SQL Server installation (wrapped in our installation).

For SQL Server 2000, this can be found on the server machine at "`Program Files\Microsoft SQL Server\80\Tools\Binn\SVRNETCN.exe`". When you open the SVRNETCN application:

1. On the "General" tab, select the "Instance(s) on this server" = `<name of computer>\RCO`
2. Under "Enabled protocols:", click TCP/IP and then click properties.
3. The "Default port:" will be displayed.

Both this TCP port and the UDP port 1434 will need to be opened within your firewall.

For SQL Server 2005, open the SQL Configuration Manager utility from Start Menu>All Programs>Microsoft SQL Server 2005.

1. In the left hand pane, select “SQL Server 2005 Network Configuration” and then select “Protocols for RCO.”

2. In the right hand pane, right click “TCP/IP” and then click Properties.
3. For “IP Addresses” read the “TCP Dynamic Ports” value.

Both the “Dynamic Ports” value and the UDP port 1434 will need to be opened within your firewall.

For SQL Server 2008, open the SQL Configuration Manager utility from Start Menu>All Programs>Microsoft SQL Server 2008.

1. In the left hand pane, select “SQL Server 2008 Network Configuration” and then select “Protocols for RCO.”
2. In the right hand pane, right click “TCP/IP” and then click Properties.
3. For “IP Addresses” read the “TCP Dynamic Ports” value.

Both the “Dynamic Ports” value and the UDP port 1434 will need to be opened within your firewall.

Label Setup

Label Setup allows you to create new label types that are added to the drop down list of available label types under *Reporting->Label Printing*.

The system comes with many standard label sizes which are listed in the grid at the bottom of the screen. If you see the size you want, select it, click *Edit* and uncheck the *Inactive* check box.

To create a new label type, click *New*. Enter the name you would like to give the label type, the brand of the label and the label or form number if applicable.

Select the print orientation and the media type.

Enter the dimensions and other characteristics of the label. A preview of the label will display on the top right side of the screen. Red indicator lines will help you to understand which dimension you are changing.

When finished, click *Update*. The label type will now be available in the *Label Type* drop down list on the *Reporting->Label Printing* screen.

Label Type	Brand	Label Number	Height	Width	Top M
Label Printer (autosense label gap)	Generic	a	1	2	
Label Printer (autosense label gap)	Generic	b	2	3	

Backup

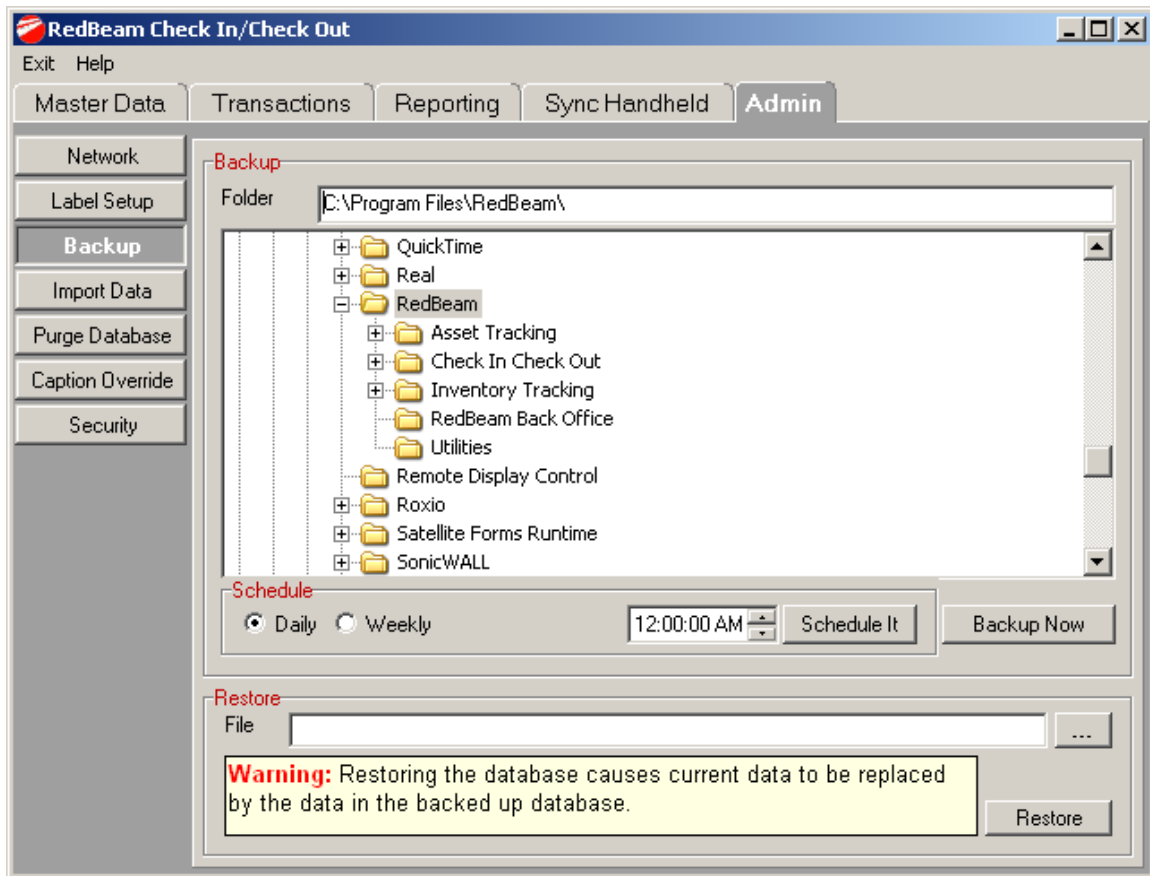
Because this software uses a Microsoft ® SQL database, you cannot simply copy the database file to create a backup. RedBeam has added this *Backup* feature to automatically handle the additional processes required to make a backup copy of the database. If you use a tape drive backup, you will likely want schedule a backup that will place a copy of the database in one of the folders backed up by your tape drive.

To create or schedule a back up of the database, click on the *Backup* tab. Be sure to access this application from the computer where the database is located. If the database is located on a server, please access this application on the server.

From the tree structure in the *Backup* section, select the folder where you would like the database backed up. If you use a tape drive backup, select a folder that is included in the tape backup.

To perform an immediate backup, click the *Backup Now* button. To schedule a backup, select the *Daily* or *Weekly* radio button in the *Schedule* section, choose the time each day or week you would like the backup to occur and click the *Schedule It* button. This will set up the SQL backup job.

To restore a backup database, click the ellipse (...) button in the *Restore* section and select the appropriate file. **WARNING: Restoring the database causes all current data to be replaced by the data in the backed up database. If you would like to replace the data, click *Restore*.**



Import Data

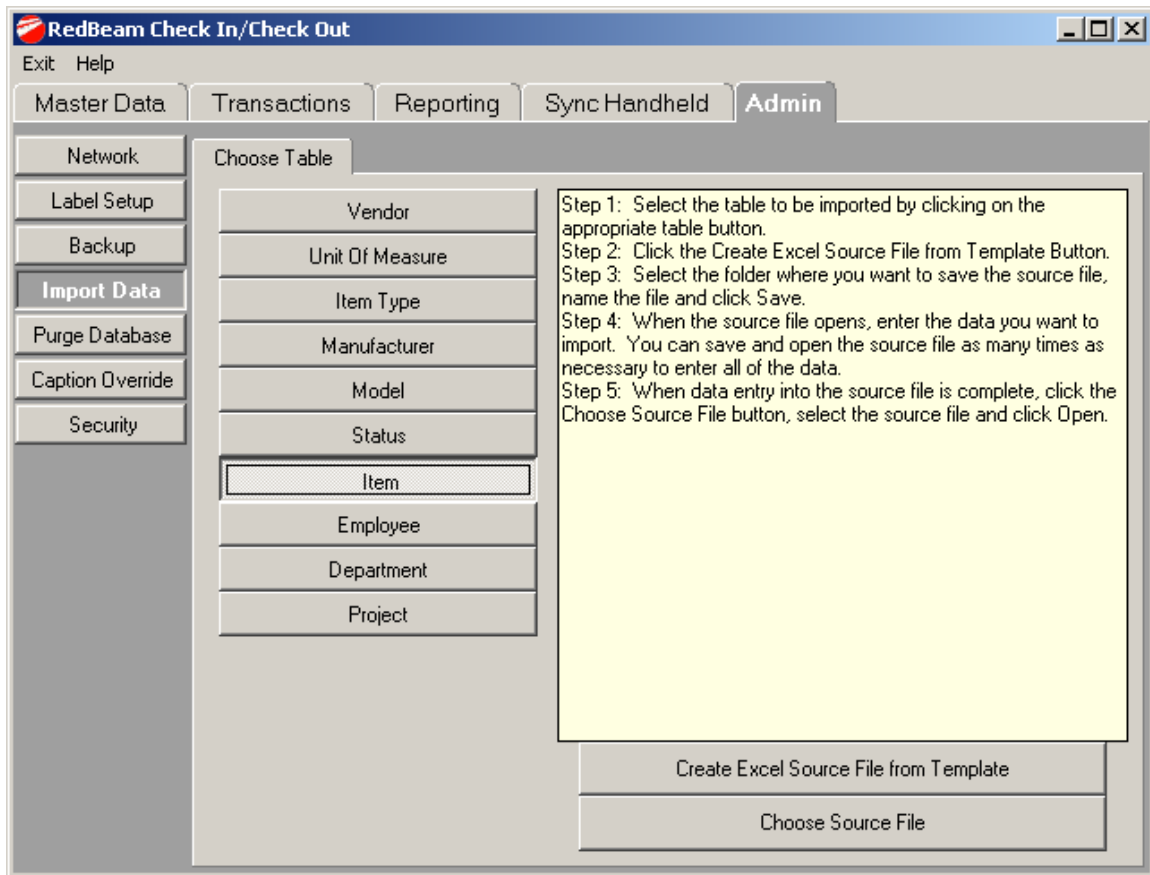
To import data into the system, click on the *Import Data* tab.

Data is imported into the system using Microsoft ® Excel spreadsheet templates. To download a template, select the table desired under the *Choose Table* section by clicking on it. Then click the *Create Excel Source File from Template* button. Select the folder you want to save the file in and remember where it is being saved. Name the file and click save.

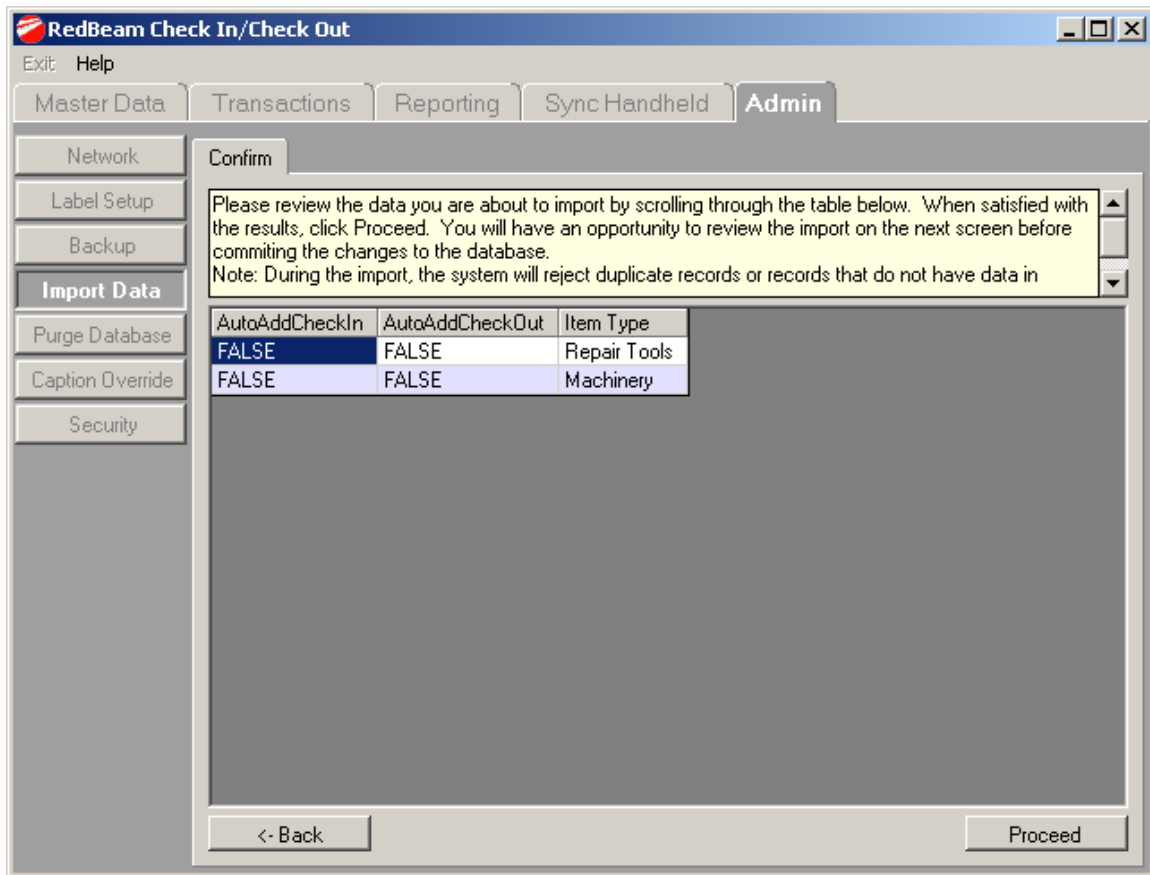
When the source file opens, enter the data you want to import. You can save and open the source file as many times as necessary to enter all of the data.

When data entry into the source file is completed, close the spreadsheet. Click the *Choose Source File* button, select the source file and click *Open*.

Note: It is recommended that all other master data be imported before importing items, since data in the item records is dependent on the other master data.



Review the data you are about to import by scrolling through the preview table. When satisfied with the results, click *Proceed*. You will have an opportunity to review the import on the next screen before committing the changes to the database.



Note: During the import, the system will reject duplicate records or records that do not have data in required fields, such as the ID fields. It will also reject records that include master data entries that do not match the master data already in the database. For example, if manufacturers that are not already entered in the manufacturer master data are imported in an item import, items with the invalid manufacturers will be rejected. Errors on invalid records will not impact the import of valid records.

The *Result* screen will list the records that were added and those that failed. If you are satisfied with the results that were added, click *Finish* to commit the data to the database. If you are not satisfied with the results that were added, click *Roll Back* to remove the data from the database.

RedBeam Check In/Check Out

Exit Help

Master Data Transactions Reporting Sync Handheld Admin

Network

Label Setup

Backup

Import Data


Purge Database

Caption Override

Security

Result

	Result	AutoAddCheckIn	AutoAddCheckOut	Item Type
✓	Ok	FALSE	FALSE	Repair Tools
✓	Ok	FALSE	FALSE	Machinery

✓ **Added:** 2
  **Roll Back:** 0

✗ **Failed:** 0

Total: 2

Roll Back Finish

Note: Data will fail to be imported for a number of reasons. The reason for failure will be listed next to the ID of the failed record. Failure normally occurs if required fields, such as ID fields are left blank, or if data the record to be imported depends on are is incorrect, such as entering an invalid manufacturer when importing an item. Entries too long for a given field will be truncated. Entries in the wrong format, like a date field or a state postal abbreviation will be set to a system default.

Purge Database

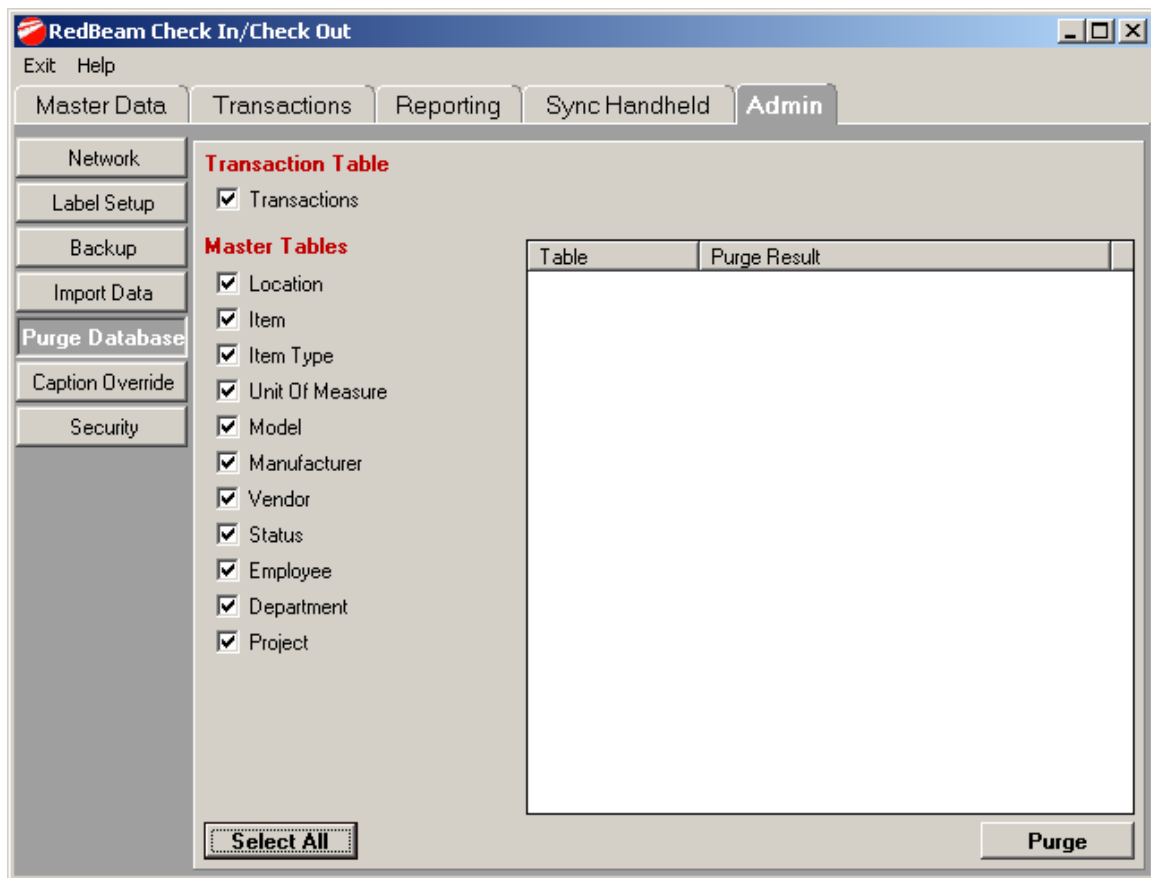
To access the purge database functions, click on the *Purge Database* tab. Under certain circumstances it is convenient to purge the database of all or selected data.

IMPORTANT: Once data is purged from the system, it cannot be recovered. Use this function carefully.

To purge data in the system and start fresh with a clean database, click *Select All*. To select specific tables, please check a check mark next to the desired table to be deleted.

Note: Because some tables are dependent on others, if you select certain tables, tables dependent on those selected will also be purged as indicated by the check boxes.

When finished selecting, click *Purge*.



Caption Override

To access the caption override functions, click on the *Caption Override* button on the left side of the menu.

Caption override allows you to change master data to better match the needs of your organization.

To change the term, enter your desired term in the *New Term* field and click *Update*. Exit and reopen the application for the changes to take effect. The new term will be updated in all areas of the system including master data, transaction, reporting and admin.

The screenshot shows the RedBeam Check In/Check Out application window. The title bar reads "RedBeam Check In/Check Out". Below the title bar is a menu bar with "Exit" and "Help". Below the menu bar is a tabbed interface with tabs for "Master Data", "Transactions", "Reporting", "Sync Handheld", and "Admin". The "Admin" tab is selected. On the left side of the "Admin" tab, there is a vertical list of buttons: "Network", "Label Setup", "Backup", "Import Data", "Purge Database", "Caption Overr...", and "Security". The "Caption Overr..." button is highlighted. The main area of the window displays the text "Select a new term to substitute in the application for the labeled term". Below this text is a table with three columns: "Default Term", "New Term", and "Current Term". The table contains four rows of data:

Default Term	New Term	Current Term
Company	Organization	Company
Building	Warehouse	Building
Room	Location	Room
Employee	Client	Employee

At the bottom right of the window, there is a green checkmark icon and a button labeled "Update".

Security

To access the security functions, click on the *Security* button on the left side of the menu. User security is not automatically active in the system. By default, it is disabled. To enable user security, click the *Enable Security for the Application* check box. The user ID and password that were created when the software was installed is the administrative user and password.

User

To create additional users for the system, click the *User* tab. Click the *New* button and enter the user ID, first name, last name, password, phone, and email. You can give this user the ability to update user security for other users by clicking on the *User Security And Database Restore Access* check box. You must also assign a user a role. The system default is *Administrator*. You may set up other roles under the *Roles* tab. When finished, click the *Update* button.

To edit a user, click the *Edit* button and update the record. When finished, click *Update*.

To delete a user, click on the *Delete* button and confirm the deletion when prompted. The user will be erased from any related records. A user may not update or delete their own user ID.

To make a user inactive, click the *Inactive* check box.

You can view all of the users by scrolling through the list on the bottom panel.

The screenshot shows the RedBeam Check In/Check Out application window. The title bar reads "RedBeam Check In/Check Out". The menu bar includes "Exit" and "Help". The main menu has tabs for "Master Data", "Transactions", "Reporting", "Sync Handheld", and "Admin". The "Admin" tab is selected, and within it, the "Security" sub-tab is active. On the left side of the Security panel, there is a vertical list of buttons: "Network", "Label Setup", "Backup", "Import Data", "Purge Database", "Caption Override", and "Security" (which is highlighted). The main area of the Security panel contains a checkbox labeled "Enable Security for the Application" which is checked. Below this are two tabs: "Users" (selected) and "Roles". The "Users" tab displays a form for user management with the following fields: "User ID" (containing "dsmith"), "First Name" (containing "Debbie"), "Last Name" (containing "Smith"), "Phone" (containing "404-249-1625"), "Email" (containing "dsmith@company.com"), "Password" (masked with "XXXXXXXXXX"), "Verify Password" (masked with "XXXXXXXXXX"), and "Role" (a dropdown menu showing "Manager"). There is also an "Inactive" checkbox which is unchecked. A checkbox labeled "User Security And Database Restore Access" is checked. At the bottom of the form is a toolbar with icons for "Find", "New", "Edit", "Copy", "Del.", "Undo", and "Update" (with a green checkmark icon). A "Barcode" button is also present.

Role

To create other roles, click the *Role* tab. Click the *New* button and enter the name of the new role.

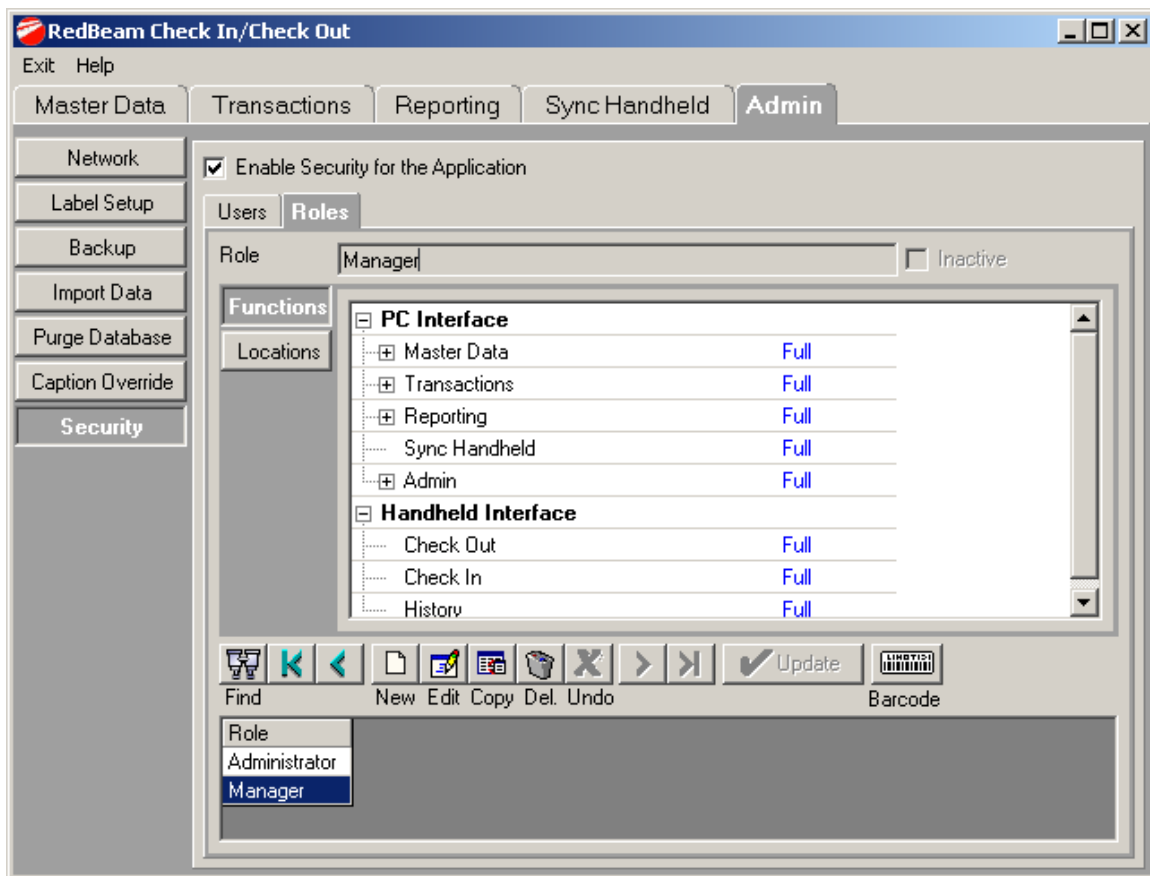
To limit user functions click the *Functions* button. From the tree structure, select the areas of the application that you would like users with this role to access. You may choose the type of access by selecting from the drop-down list to the right of the function. Although options may be limited for some functions, you may choose from:

None – hides the function from the user to prevent access

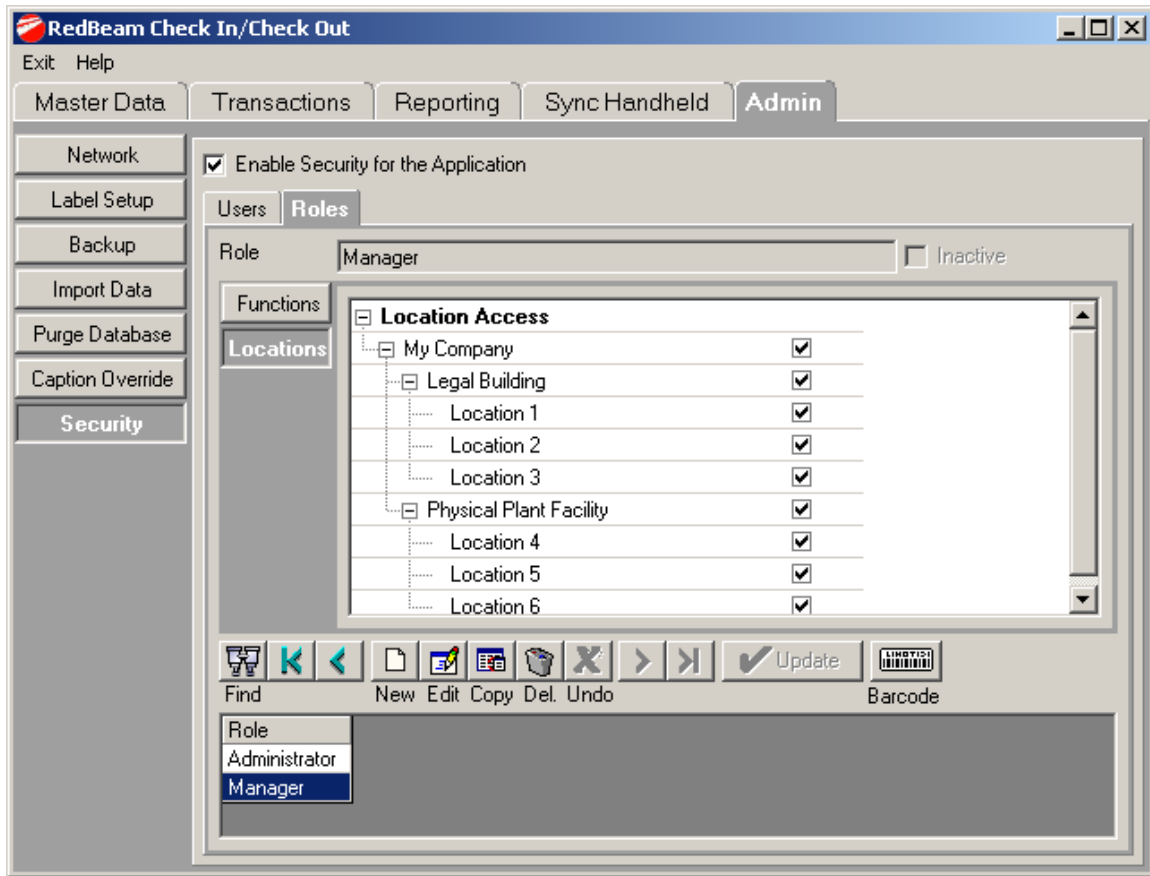
View – gives the user the ability to only view data

Edit – gives the user the ability to edit, but not the ability to add or delete records

Full – gives the user full access



To limit access to locations click the *Locations* button. From the tree structure, uncheck the locations that you do not want a user with this role to access.



When finished, click the *Update* button.

To edit a role, click the *Edit* button and update the record. When finished, click *Update*.

To delete a role, click on the *Delete* button and confirm the deletion when prompted. A role may not be deleted if it is assigned to a user.

To make a role inactive, click the *Inactive* check box. This will remove the role from the drop-down lists in the system, but will not alter existing users assigned to the role.

You can view all of the roles by scrolling through the list on the bottom panel.

Registration

The *Registration* screens include four tabs including *Customer*, *Reseller*, *Activation* and *Support*.

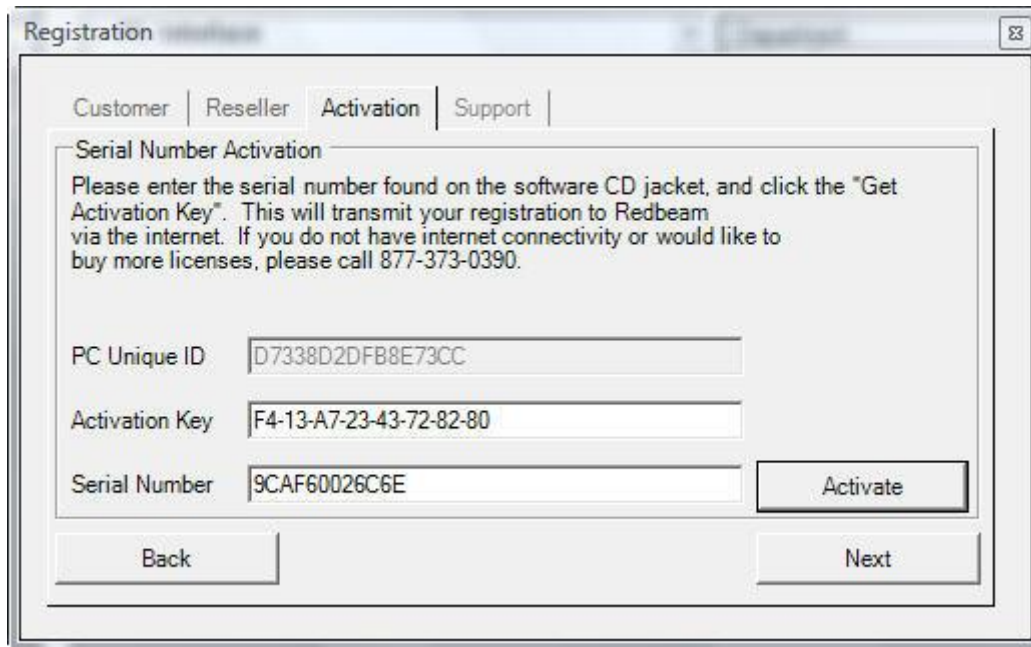
Under the *Customer* tab, enter information about your company including company name, your name, address, phone and email.

The screenshot shows the 'Registration' window with the 'Customer' tab selected. The window title is 'Registration'. At the top, there are four tabs: 'Customer', 'Reseller', 'Activation', and 'Support'. Below the tabs is a section titled 'Company Information' with the note 'All fields are mandatory.' The form contains the following fields: 'Company' (text box with 'RedBeam, Inc.'), 'First Name' (text box with 'John'), 'Last Name' (text box with 'Smith'), 'Street' (text box with '3820 Mansell Road, Suite 280B'), 'City' (text box with 'Alpharetta'), 'State' (dropdown menu with 'GA' selected), 'Zip Code' (text box with '30022'), 'Phone' (text box with '877-373-0930'), and 'Email' (empty text box). Below the fields is a checkbox labeled 'Please send me update and renewal notices via email.' which is checked. At the bottom are two buttons: 'Cancel' and 'Next'.

Under the *Reseller* tab, enter information about the company you purchased the RedBeam system from including company name, your contact's name, address, phone and email. This information can be accessed later if you need to order additional licenses, upgrades, support or supplies.

The screenshot shows the 'Registration' window with the 'Reseller' tab selected. The window title is 'Registration'. At the top, there are four tabs: 'Customer', 'Reseller', 'Activation', and 'Support'. Below the tabs is a section titled 'Reseller Information' with the note '** fields are mandatory.' The form contains the following fields: '** Reseller' (text box with 'Acme Barcode Solutions'), 'First Name' (text box with 'Sandra'), 'Last Name' (text box with 'Johnson'), 'Street' (text box with '5570 Sandlewood Lane'), 'City' (text box with 'Hollywood'), 'State' (dropdown menu with 'CA' selected), 'Zip Code' (text box with '93823'), 'Phone' (text box with '984-555-2038'), and 'Email' (text box with 'sandra.johnson@acmebarcode.com'). At the bottom are two buttons: 'Back' and 'Next'.

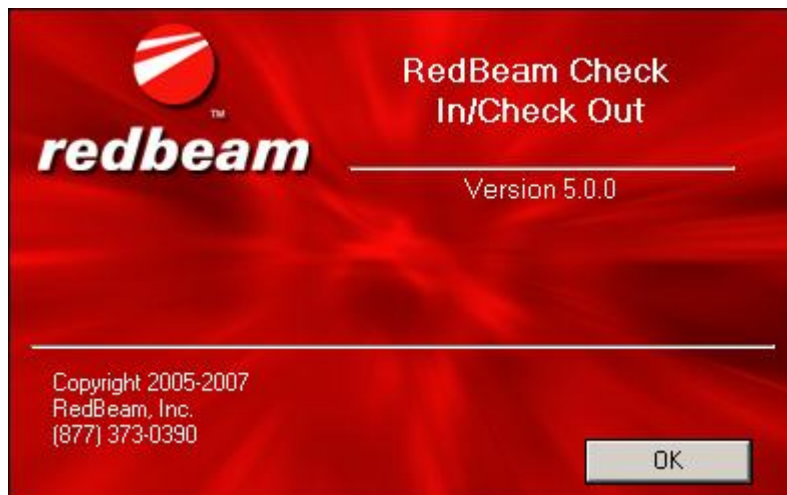
Under the *Activation* tab, enter your product serial number and click *Activate*. If you have internet connectivity, the *Activation Key* will automatically be populated by the system. If you do not have internet connectivity, please call 877-373-0390 and provide one of our support specialists the *PC Unique ID* displayed on the screen and your product serial number. They will then verbally provide the activation key for your machine.



The image shows a 'Registration' window with four tabs: 'Customer', 'Reseller', 'Activation', and 'Support'. The 'Activation' tab is selected. Inside the tab, there is a section titled 'Serial Number Activation' with the following text: 'Please enter the serial number found on the software CD jacket, and click the "Get Activation Key". This will transmit your registration to Redbeam via the internet. If you do not have internet connectivity or would like to buy more licenses, please call 877-373-0390.' Below this text are three input fields: 'PC Unique ID' with the value 'D7338D2DFB8E73CC', 'Activation Key' with the value 'F4-13-A7-23-43-72-82-80', and 'Serial Number' with the value '9CAF60026C6E'. To the right of the 'Serial Number' field is an 'Activate' button. At the bottom of the window are 'Back' and 'Next' buttons.

About

The *About* menu shows information regarding RedBeam Check In/Check Out™ including the version number.



Section 3: Using the Mobile Computers

If you are using the *Mobile Edition* of the software, the mobile computer portion of RedBeam Check In/Check Out™ is loaded during the initial sync with the handheld which is described under the Sync Handheld section of this manual. Once the installation is finished, re-sync to complete the upload of master data.

To use the program on the mobile computer, go to *Start->Programs* and click the *Check Out In* icon.

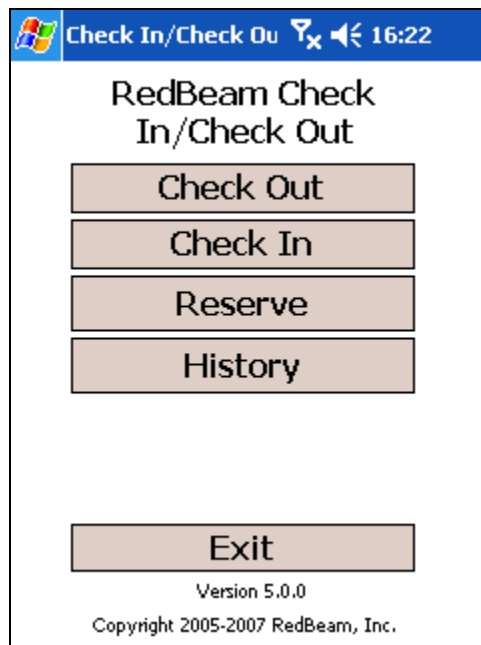
Login

If user security is active, you will be presented with the *Login* screen. Select your user ID, enter your password and click *OK*.

Main Menu

Functions on the main menu include *Check Out*, *Check In*, *Reserve* and *History*.

To access a function, click the button with that function name.



Check Out

1.To check out items, scan the barcode of the location you would like to receive into.

Note: You can also select a location from the location tree structure, which is accessed by clicking the drop down menu.

2.Scan or enter the ID of the employee checking out the item.

3.Optionally, you can enter a reference number using the keypad.

4.If you use projects, enter the project this item will be assigned to using the drop down.

5.If you use statuses, enter the status of the item.

6.Scan the barcode ID of the item you would like to check out or key in the barcode ID.

7.If this item allows changes at check out, click the check mark to access the *Fee/Period* tab.

8.If desired, click the Note or Fee/Period tab and make adjustments.

9.When finished, click the + button to add the item. Add all of the items for this transaction and click *Update*.

You can clear any field on this screen by clicking the *Clr* button.

Check Out - Check 1 6:36

11/22/05 6:35:00 PM Now

Location Loc4 Clr

Employee e1 Clr

Ref No 1234 Clr

Project Project A

Status Good

Item TI1 ✓ Clr

Check Out Note

Location Barcode	Item Barcode

Exit New + Update

To enter notes, click the *Notes* tab.

The screenshot shows a handheld device screen with a blue header bar containing the Windows logo, the text 'Check Out - Check I', and a battery icon with the time '6:37'. Below the header is a large text area containing the note 'Includes spare battery.' At the bottom, there is a navigation bar with three tabs: 'Check Out', 'Note' (which is selected), and an unlabeled tab. Below the tabs are two columns: 'Location Barcode' and 'Item Barcode'. At the very bottom is a control bar with buttons for 'Exit', a minus sign, 'New', a plus sign, and 'Update'.

If changes for the item are allowed at check out, click the *Fee/Period* tab and make the desired changes. The tab is activated by clicking the check mark next to the item on the *Check Out* tab.

The screenshot shows a handheld device screen with a blue header bar containing the Windows logo, the text 'Check Out - Check', and a battery icon with the time '05:50'. Below the header are input fields for 'Period' (set to 'Daily'), 'Period Qty' (set to '1'), and 'Fee' (set to '10'). There is a 'Clr' button next to the 'Fee' field and a checked checkbox for 'Include Weekends'. Below these fields is a navigation bar with three tabs: 'Check Out', 'Note', and 'Fee/Period' (which is selected). Below the tabs are two columns: 'Location Barcode' and 'Item Barcode'. At the very bottom is a control bar with buttons for 'Exit', a minus sign, 'New', a plus sign, and 'Update'.

If fees are charged during check out, a fee pay message will pop up when *Update* is clicked. Enter the amount being paid. If the amount is not exact, the amount still due or the change will be displayed.

The screenshot shows a software interface for a 'Check Out' process. At the top, a blue header bar contains the text 'Check Out - Check I' and a clock icon showing '6:45'. Below this, there are input fields for the date '11/22/05' and time '6:35:00 PM', with a 'Now' button. A 'Location' dropdown menu is set to 'Loc4'. A modal dialog box is open in the center, titled 'Transaction Fee \$10.00'. It contains a 'Fee Paid' input field with '8.00' entered, and a 'Difference' field showing '\$2.00'. The dialog has 'Cancel' and 'Ok' buttons. Below the dialog, a 'Check out' section shows a table with 'Location Barcode' (Loc4) and 'Item Barcode' (TI1). At the bottom, there are buttons for 'Exit', 'New', and 'Update', along with a keyboard icon.

Location Barcode	Item Barcode
Loc4	TI1

Exit New + Update

Check In

1.To check in items, scan the barcode of the location you would like to receive into.

Note: You can also select a location from the location tree structure, which is accessed by clicking the drop down menu.

2.Optionally, you can enter a reference number using the keypad.

3.If you use statuses, enter the status of the item.

4.Scan the barcode ID of the item you would like to check out or key in the barcode ID.

5.If this item allows changes at check in, click the check mark and a *Fee* field will display. Make any desired fee adjustments in the *Fee* field.

6.When finished, click the + button to add the item. Add all of the items for this transaction and click *Update*.

You can clear any field on this screen by clicking the *Clr* button.

Check In - Check In 7:06

11/22/05 7 :04:57 PM Now

Location Loc4 Clr

Ref No 1234 Clr

Status Good

Item TI1 ✓ Clr

Check In Note

Location Barcode	Item Barcode
------------------	--------------

Exit - New + Update

To enter notes, click the *Notes* tab.

The screenshot shows a handheld device screen with a blue header bar containing the text 'Check In - Check In' and a clock showing 7:07. Below the header is a large text area with the note 'Includes spare battery.' Below this is a tabbed interface with 'Check In' and 'Note' tabs. Under the 'Note' tab, there are two columns labeled 'Location Barcode' and 'Item Barcode'. Below these columns is a large grey rectangular area. At the bottom of the screen is a navigation bar with buttons: 'Exit', a minus sign, 'New', a plus sign, and 'Update'. There is also a small keyboard icon and an upward arrow at the bottom right.

If fees are charged during check in, a fee pay message will pop up when *Update* is clicked. Enter the amount being paid. If the amount is not exact, the amount still due or the change will be displayed.

The screenshot shows the same handheld device screen, but now a dialog box is open over the 'Update' button. The dialog box contains the following information: 'Transaction Fee \$2.00', 'Fee Paid 1.50' (with '1.50' in a text input field), and 'Difference \$0.50'. At the bottom of the dialog box are 'Cancel' and 'Ok' buttons. The background application window shows the date '11/22/05', time '7:04:00 PM', and location 'Loc4'. The navigation bar at the bottom is the same as in the previous screenshot.

Reserve

1.To reserve items, scan the barcode of the item location.

Note: You can also select a location from the location tree structure, which is accessed by clicking the drop down menu.

2.Scan or enter the ID of the employee reserving the item.

3.Optionally, you can enter a reference number using the keypad.

4.If you use projects, enter the project this item will be assigned to using the drop down.

5.Select the reserve from and to dates for the item.

6.Scan the barcode ID of the item you would like to reserve or key in the barcode ID.

7.If desired, click the Note tab and add comments.

8.When finished, click the + button to add the item. Add all of the items for this transaction and click *Update*.

You can clear any field on this screen by clicking the *Clr* button.

Reserve - Check In	
Location	Loc4 Clr
Employee	e1 Clr
Ref No	1234 Clr
Project	Project A
From	9 /10/07 12 00 00 AM
To	9 /10/07 11 59 00 PM
Item	TI1 Clr
Check Out Note	
Location Barcode Item Barcode	
Exit - New + Update	

To enter notes, click the *Notes* tab.

Reserve - Check In 16:33

Check Out Note

Location Barcode Item Barcode

Exit - New + Update

History

The transaction history allows you to review and amend your mobile computer data file before uploading to the PC.

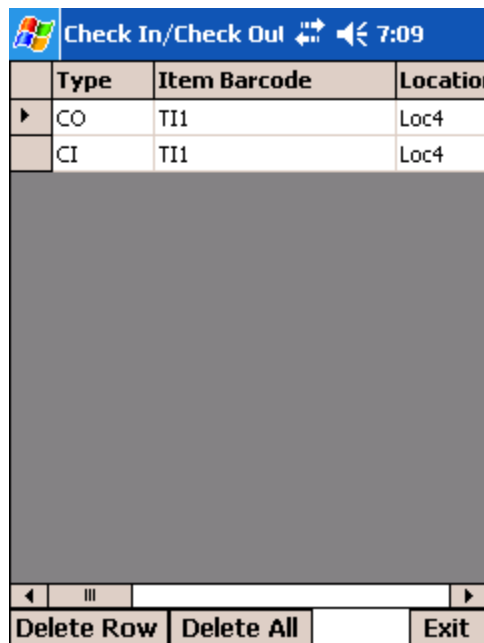
You can scroll up and down the record list using the scroll bar on the right side of the screen. The most recent record will be on the top.

You can scroll left and right to view additional information about the transaction including the reference number.

If you have made an error in scanning, you can select the record and delete it by clicking on the *Delete Row* button on the bottom of the screen. If you want to delete all records, click the *Delete All* button.

To exit the transaction history, click *Exit*.

Note: When you sync with the PC, all transactions will be removed from the mobile computer.



Type	Item Barcode	Location
CO	TI1	Loc4
CI	TI1	Loc4

◀		▶
Delete Row	Delete All	Exit

Resetting the Scanner

Performing a Soft Reset

A soft reset restarts the terminal and saves all stored records and entries.

Caution: Files that remain open during a soft reset may not be retained. DO NOT perform a soft reset if the terminal is suspended. Press the power button to wake the terminal; if the terminal does not turn on, perform a soft reset.

To perform a soft reset, please consult your scanner user manual.

Performing a Hard Reset

A hard reset also restarts the scanner but erases all stored records and entries. **Therefore, never perform a cold boot unless a warm boot does not solve the problem.**

To perform a hard reset, please consult your scanner user manual.